Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - September 30, 2015

Weekly Federal Bison Slaughter

	01-Aug	08-Aug	15-Aug	22-Aug	August Total	January - August YTD 2015	2014	% Change
Total Canada	**241**	**252**	**201**	**299**	**993**	**7,677**	**7,363**	**4.3%**
previous year	*117*	*269*	*221*	*272*	***879***			

Provincially Inspected Slaughter

	Mar 2015	Apr 2015	May 2015	June 2015	July 2015	July 2014	January - July YTD 2015	2014	% Change
Alberta	82	109	88	81	85	142	640	852	-24.9%
Saskatchewan	24	10	10	20	15	5	151	100	51.0%
Manitoba/BC	53	33	36	76	48	70	337	457	-26.3%
Ontario/Quebec**	13	9	44	41	31	48	163	150	8.7%
Total	**172**	**161**	**178**	**218**	**179**	**265**	**1,291**	**1,559**	**-17.2%**

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

	YTD 2015	YTD 2014	% Change
Total Canadian Federal and Provincial Slaughter *	**8,968**	**8,922**	**0.5%**

**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

	2009	2010	2011	2012	2013	2014	January - July YTD 2015	2014	% Change
Total Slaughter	23,809	19,149	13,048	13,587	14,388	14,371	7,975	8,043	**-0.8%**
Total Live Exports	25,118	20,973	14,465	14,007	16,769	19,033	14,255	10,170	**40.2%**
Total Production	**48,927**	**40,122**	**27,513**	**27,594**	**31,157**	**33,404**	**22,230**	**18,213**	**22.1%**

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

US Federal Slaughter*

for week ending:	01-Aug	08-Aug	15-Aug	22-Aug	August Total	January - August YTD 2015	2014	% Change
	1,003	**906**	**1,246**	**810**	**3,965**	**34,386**	**34,435**	**-0.1%**
previous year	*908*	*886*	*947*	*1,031*	***3,772***			

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

Canada Live Bison Exports to US

	Apr-15	May-15	June-15	July-15	Aug-15	January - August YTD 2015	2014	% Change
Slaughter Male	761	510	691	789	914	5,599	4,902	**14.2%**
Slaughter Female	1077	810	590	736	895	5,972	4,776	**25.0%**
Feeder Male	542	424	229	241	0	2,447	1,019	**140.1%**
Feeder Female	663	344	346	0	0	2,046	847	**141.6%**
Total	**3,043**	**2,088**	**1,856**	**1,766**	**1,809**	**16,064**	**11,544**	**39.2%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless

		February 2015	March	April	May	June	July	January - July YTD 2015	2014	% Change
USA	Kg	32,381	42,010	13,854	27,506	47,985	15,839	**195,884**	**120,915**	**62.0%**
	Value ($Cdn)	506,461	615,178	260,080	401,157	643,435	303,802	**3,005,842**	**1,678,720**	**79.1%**
France	Kg	4,545	597	12,206	1,559	7,266	10,972	**44,550**	**59,980**	**-25.7%**
	Value ($Cdn)	73,731	10,329	195,558	26,355	124,922	174,127	**723,952**	**972,058**	**-25.5%**
Switzerland	Kg	3,194	7,108	3,748	1,844	8,461	2,169	**27,724**	**20,688**	**34.0%**
	Value ($Cdn)	114,977	358,606	106,828	52,568	241,136	101,307	**1,027,152**	**957,232**	**7.3%**
Mexico	Kg	-	-	-	-	-	-	**-**	**18,137**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**98,447**	**-**
Italy	Kg	-	-	-	-	-	-	**-**	**2,699**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**72,243**	**-**
French Southern Terr.	Kg	-	-	-	-	-	-	**-**	**513**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**15,138**	**-**
Belgium	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Other Countries	Kg	10,568	160	-	234	-	-	**10,962**	**-**	**-**
	Value ($Cdn)	83,630	4,658	-	7,306	-	-	**95,594**	**-**	**-**
Total	**Kg**	**50,688**	**49,875**	**29,808**	**31,143**	**63,712**	**28,980**	**279,120**	**222,932**	**25.2%**
	Value ($Cdn)	**778,799**	**988,771**	**562,466**	**487,386**	**1,009,493**	**579,236**	**4,852,540**	**3,793,838**	**27.9%**

Bone-in

		February 2015	March	April	May	June	July	January - July YTD 2015	2014	% Change
Total	**Kg**	**1,419**	**739**	**677**	**170**	**1,386**	**378**	**10,818**	**15,036**	**-28.1%**
	Value ($Cdn)	**17,164**	**7,789**	**7,105**	**1,759**	**27,099**	**4,131**	**82,484**	**162,053**	**-49.1%**

Total Exports, Boneless and Bone-in

	February 2015	March	April	May	June	July	January - July YTD 2015	2014	% Change
Kg	**52,107**	**50,614**	**30,485**	**31,313**	**65,098**	**29,358**	**289,938**	**237,968**	**21.8%**
Value ($Cdn)	**795,963**	**996,560**	**569,571**	**489,145**	**1,036,592**	**583,367**	**4,935,024**	**3,955,891**	**24.8%**

**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)
Aug 2014	402.37	389.93	322.74	290.13
Sept 2014	405.63	393.40	338.00	285.00
Oct 2014	407.70	392.73	323.96	296.63
Nov 2014	408.78	394.14	328.90	296.82
Dec 2014	408.75	395.36	322.93	303.09
Jan 2015	409.17	396.14	325.85	298.78
Feb 2015	413.32	399.80	325.53	316.01
Mar 2015	413.87	400.81	325.60	320.75
Apr 2015	421.84	407.93	326.80	316.41
May 2015	421.73	407.12	325.77	326.68
June 2015	423.32	407.03	340.00	329.73
July 2015	424.21	410.07	350.00	341.11
Aug 2015	423.71	411.66	350.00	359.07

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
Sept 2014	400-455	385-435	250-300	275-300
Oct 2014	425-455	400-435	250-300	275-300
Nov 2014	425-455	400-435	250-300	275-300
Dec 2014	425-455	400-435	250-300	275-300
Jan 2015	425-455	400-435	275-325	275-325
Feb 2015	435-460	435-450	325-350	325-350
Mar 2015	469-500	435-480	325-350	325-350
Apr 2015	469-500	449-480	325-350	325-350
May 2015	475-505	445-485	325-350	325-350
June 2015	475-505	445-485	325-350	325-350
July 2015	500-520	480-500	350-375	340-360
Aug 2015	500-520	480-500	350-375	340-360
Sept 2015	500-530	480-510	400	400

**source CBA survey of marketers*

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

	June 2015		July 2015		August 2015		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,050-1,650	1,366.09	1,050-1,650	1,267.77	1,175-1,506	1,223.46	-10.4%	-3.5%
Chuckroll/Clod Fresh	500-700	616.01	500-710	629.16	598-750	619.82	0.6%	-1.5%
Striploin Fresh	850-1,650	1,309.97	875-1,650	1,192.16	920-1,195	1,134.12	-13.4%	-4.9%
Tenderloin Fresh	1,400-2,680	2,057.33	1,400-2,300	2,072.49	1,710-2,574	2,077.65	1.0%	0.2%
Ground 90% Bulk, Fresh	525-640	582.00	525-640	580.00	598-1,630	603.37	3.7%	4.0%
Ground 85% Bulk, Frozen	575-675	627.42	575-675	649.72	630-722	664.17	5.9%	2.2%
Ground 85% Patties, Frozen	500-675	639.69	500-675	656.52	647-716	670.68	4.8%	2.2%

**source USDA*

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

	Mid-June 2015 Pricing	Mid-July 2015 Pricing	Mid-August 2015 Pricing	Mid-September 2015 Pricing
Tenderloin - Fresh	$52.00 - $57.95	$45.00 - $57.95	$45.00 - $60.00	$52.00 - $58.75
Strip Loin Boneless - Fresh	$31.95 - $32.00	$29.00 - $34.00	$29.00 - $34.00	$31.95 - $35.00
Inside Round - Fresh	$15.50 - $17.05	$15.75 - $19.50	$15.75 - $19.50	$16.25 - $19.50
Ground 90% Bulk Fresh	$16.00 - $16.95	$15.00 - $15.95	$15.00 - $15.95	$15.00 - $16.95
Fresh Bison Trim	$14.00 - $14.95	$14.00 - $14.95	$14.00 - $14.95	$14.00 - $15.95

**source CBA survey of marketers*

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

Kramer Auction Sales Ltd. (SK) (May 13th, 2015) ***418 Head***

Class	Total Weight	# of head	Avg ($/lb)
2014 BULLS CALVES			
600-699 lbs	36,820	58	$3.36
500-599 lbs	51,450	94	$3.52
400-499 lbs	35,420	77	$3.67
Under 399	5,350	16	$2.94
2013 YEARLING BULLS			
820-915 lbs	6,120	7	$2.97
620-750 lbs	12,720	18	$2.77
2013 BREEDING BULLS	2,180	2	$3,400 (avg)
2012 BREEDING BULLS	8,595	8	$3,325 (avg)
2014 HEIFER CALVES			
500-650 lbs	23,965	44	$3.35
400-499 lbs	21,965	49	$3.08
300-349 lbs	9,210	25	$3.00
Under 300	2,455	9	$2.80
2013 YEARLING HEIFERS			
580-680 lbs	3,030	5	$3.15
490-579 lbs	3,215	6	$2.53

Great Spirit Show & Sale (MB) (Apr 4, 2015)
Heartland Livestock Services

Year, Sex	Breed	Price
2012 BULLS		
Silver Creek	Wood X	$9,500
2013 BULLS		
Silver Creek	Wood X	$8,000
Bison Spirit Rancl	Wood X	$8,500
Bison Spirit Rancl	Wood X	$7,500
2014 BULLS		
Sandridge Bison	Wood X	$3,500
Shale Creek Biso	Wood	$2,400
Sandridge Bison I	Wood X	$2,800
2013 HEIFERS		
Shale Creek	Wood X	$6,750
Beldon Bison Rar	Wood X	$4,200
Beldon Bison Rar	Wood X	$3,000
2014 HEIFERS		
Rough Bark	Wood X	$2,200
Sandridge Bison I	Wood X	$1,950
Rough Bark Bisor	Wood X	$2,150

Kramer Auction Sales Ltd. (SK) (March 11th, 2015)
Cloverleaf Bison Sale ***380 Head***

Year, Sex, Lbs	# of head	Avg ($/lb)
2014 BULLS CALVES		
551 + lbs	32	$3.80
500-550 lbs	33	$4.08
450-499 lbs	38	$4.30
400-449 lbs	46	$4.33
350-399 lbs	17	$4.12
349 & Under	14	$2.97
2013 BREEDING $3000-$4900 weighing 1130 lbs		
$4250-$7700 weighing 1135 lbs		
2013 YEARLING BULLS		
600-700 lbs	6	$3.30
Off Types	3	$2.27
2012 BULLS	2	$2.40
2014 HEIFER CALVES		
500 + lbs	25	$3.47
450-499 lbs	28	$3.50
400-449 lbs	51	$3.42
350-399 lbs	48	$3.51
349 & Under	19	$3.63
2013 YEARLING HEIFERS		
600 + lbs	1	$3.20
Off Types	3	$2.00
2012 FEMALES		
Off Types	2	$2.25
CULL COWS Prices : Hi $1,000 and Low $800		
*** 12 Off type calves/yearlings removed from averages*		

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

Prices offered to producers in mid-September increased to $5.30 per pound HHW for Grade "A" bulls. U.S. buyers offered $4.25 U.S. with returns dependent on exchange rates, quality, transport incentives, and export costs. Canadian buyers paid up to $5.10 per pound HHW for Grade 'A" heifers. U.S. buyers were offering $4.10 U.S. with returns dependent on exchange rates, quality, and export costs.

Nationally, federal slaughter was up 4.3% in the first 34 weeks of 2015 (week ending August 22, 2015) when compared to 2014 levels (7,677 animals in 2015 compared to 7,363 animals in 2014). Live animal exports for the first 8 months of 2015 were 16,064 head – up by 39.2% when compared to the 11,544 head exported during the first 8 months of 2014. This significant increase has been driven by strong consumer demand and the lower value of the Canadian dollar relative to the US dollar.

Marketers report that there is continued strong demand for bison trim and certain hip cuts in the United States and Canada. In Canada, demand for other cuts is steady with some consumer price resistance being reported. There are reports of some orders for ground products being shorted. European demand is reported to be steady. There is an inventory build-up of strip loins and tenderloins.

Some reports indicate that present supplies of finished bison are tight, while others see a shortage of live bison for processing. Bison prices in Canada are expected to continue to be sensitive to Canada- US exchange rates.

Increased exports of feeder animals to the US are expected to create shortages in the Canadian market next year.

Chart 1

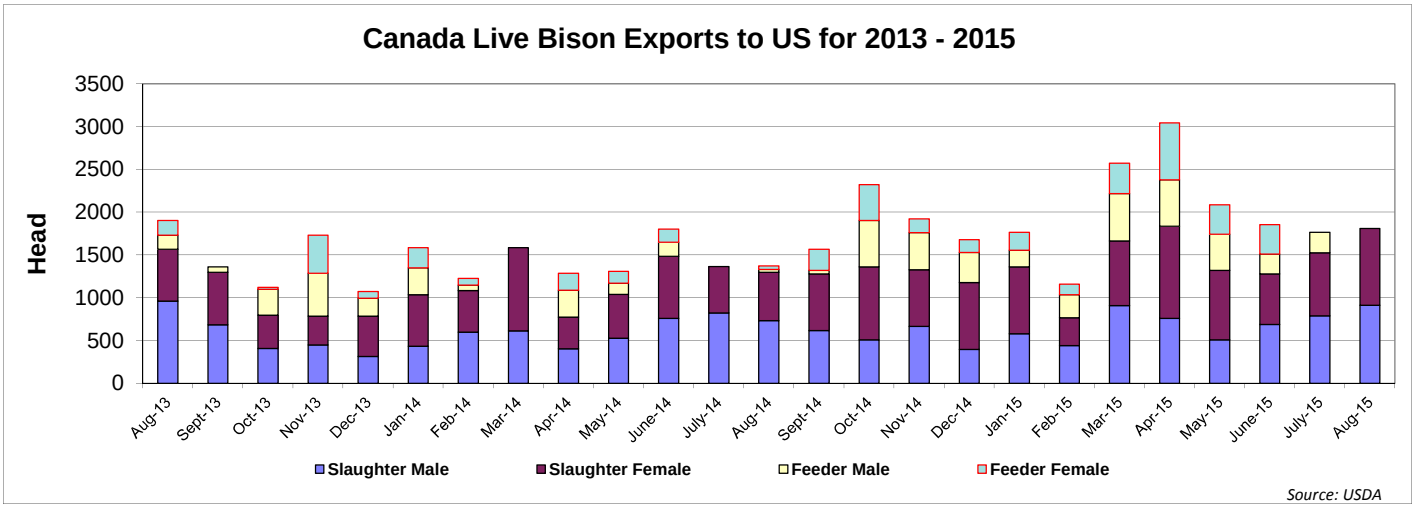
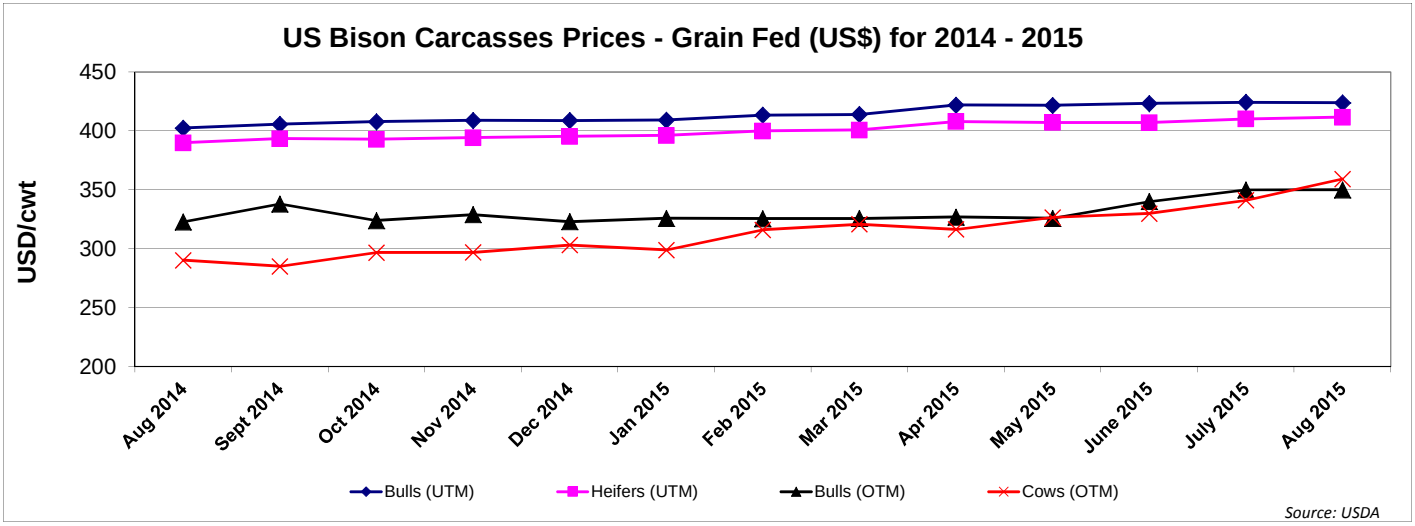


Chart 2



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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