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BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - May 25, 2015

Weekly Federal Bison Slaughter

	04-Apr	11-Apr	18-Apr	25-Apr	April Total	January - April YTD 2015	2014	% Change
Total Canada	**235**	**126**	**247**	**63**	**671**	**3,863**	**3,715**	**4.0%**
previous year	*358*	*127*	*280*	*98*	***863***			

Provincially Inspected Slaughter

	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015	Mar 2014	January - March YTD 2015	2014	% Change
Alberta	61	94	90	105	82	109	277	329	-15.8%
Saskatchewan	15	14	49	23	24	9	96	68	41.2%
Manitoba/BC	66	80	37	54	53	90	144	216	-33.3%
Ontario/Quebec**	8	20	12	7	7	14	26	35	-25.7%
Total	**150**	**208**	**188**	**189**	**166**	**222**	**543**	**648**	**-16.2%**

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

	YTD 2015	YTD 2014	% Change
Total Canadian Federal and Provincial Slaughter *	**4,406**	**4,363**	**1.0%**

**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 - March YTD 2015	2014	% Change
Total Slaughter	23,809	19,149	13,048	13,587	14,388	14,371	3,735	3,500	**6.7%**
Total Live Exports	25,118	20,973	14,465	14,007	16,769	19,033	5,502	4,402	**25.0%**
Total Production	**48,927**	**40,122**	**27,513**	**27,594**	**31,157**	**33,404**	**9,237**	**7,902**	**16.9%**

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

US Federal Slaughter*

for week ending:	04-Apr	11-Apr	18-Apr	25-Apr	April Total	January - April YTD 2015	2014	% Change
	1,032	**877**	**906**	**868**	**3,683**	**17,174**	**17,338**	**-0.9%**
previous year	*918*	*960*	*938*	*1,019*	***3,835***			

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

Canada Live Bison Exports to US

	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	January - April YTD 2015	2014	% Change
Slaughter Male	399	582	442	910	761	2,695	2,055	**31.1%**
Slaughter Female	781	781	327	756	1077	2,941	2,431	**21.0%**
Feeder Male	350	192	267	552	542	1,553	691	**124.7%**
Feeder Female	150	212	124	357	663	1,356	511	**165.4%**
Total	**1,680**	**1,767**	**1,160**	**2,575**	**3,043**	**8,545**	**5,688**	**50.2%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		October 2014	November	December	January 2015	February	March	January - March YTD 2015	2014	% Change
USA	Kg	24,406	25,273	22,037	16,309	28,001	43,665	**87,975**	**37,894**	**132.2%**
	Value ($Cdn)	273,190	354,241	289,932	275,729	441,070	658,011	**1,374,810**	**555,218**	**147.6%**
France	Kg	17,847	10,870	1,381	7,405	4,545	597	**12,547**	**35,321**	**-64.5%**
	Value ($Cdn)	129,843	49,770	22,938	118,930	73,731	10,329	**202,990**	**572,695**	**-64.6%**
Switzerland	Kg	2,865	7,791	8,218	1,200	3,194	7,108	**11,502**	**8,763**	**31.3%**
	Value ($Cdn)	145,932	351,354	289,322	51,730	114,977	358,606	**525,313**	**404,814**	**29.8%**
Mexico	Kg	-	-	-	-	-	-	**-**	**18,137**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**98,447**	**-**
Italy	Kg	-	-	-	-	-	-	**-**	**900**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**22,857**	**-**
French Southern Terr.	Kg	-	21	-	-	-	-	**-**	**513**	**-**
	Value ($Cdn)	-	681	-	-	-	-	**-**	**15,138**	**-**
Belgium	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Other Countries	Kg	-	850	378	-	10,568	160	**10,728**	**-**	**-**
	Value ($Cdn)	-	17,663	14,290	-	83,630	4,658	**88,288**	**-**	**-**
Total	**Kg**	**45,118**	**44,805**	**32,014**	**24,914**	**46,308**	**51,530**	**122,752**	**101,528**	**20.9%**
	Value ($Cdn)	**548,965**	**773,709**	**616,482**	**446,389**	**713,408**	**1,031,604**	**2,191,401**	**1,669,169**	**31.3%**

Bone-in		October 2014	November	December	January 2015	February	March	January - March YTD 2015	2014	% Change
Total	**Kg**	**324**	**259**	**3,371**	**6,049**	**1,419**	**739**	**8,207**	**7,986**	**2.8%**
	Value ($Cdn)	**3,459**	**2,750**	**36,039**	**17,437**	**17,164**	**7,789**	**42,390**	**83,857**	**-49.4%**

Total Exports, Boneless and Bone-in	October 2014	November	December	January 2015	February	March	January - March YTD 2015	2014	% Change
Kg	**45,442**	**45,064**	**35,385**	**30,963**	**47,727**	**52,269**	**130,959**	**109,514**	**19.6%**
Value ($Cdn)	**552,424**	**776,459**	**652,521**	**463,826**	**730,572**	**1,039,393**	**2,233,791**	**1,753,026**	**27.4%**

**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)
Apr 2014	389.40	370.66	301.67	275.49
May 2014	390.49	373.95	324.26	287.48
June 2014	394.17	381.65	325.69	291.62
July 2014	397.58	385.95	328.09	287.96
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

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows	$/cwt live weight 2012 Bulls	2012 Heifers	2013 Bulls	2013 Heifers
May 2014	385-400	375-385	220-250	220-250			245-260	220-240
June 2014	385-400	375-385	220-250	220-250				
July 2014	400-410	385-395	250-300	250-280				
Aug 2014	400-410	385-395	250-300	250-280				
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				

**source CBA survey of marketers*

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

	February 2015		March 2015		April 2015		% Change Current Month vs. 2 months prior	1 month prior
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg		
Ribeye Lip-On Fresh	1,100-1,650	1,385.95	1,050-1,650	1,451.21	1,050-1,650	1,429.42	3.1%	-1.5%
Chuckroll/Clod Fresh	500-675	592.57	500-702	614.56	500-700	612.76	3.4%	-0.3%
Striploin Fresh	1,000-1,650	1,358.11	1,000-1,650	1,390.03	890-1,650	1,358.32	0.0%	-2.3%
Tenderloin Fresh	1,550-2,595	2,089.26	1,500-2,680	2,137.87	1,500-2,680	2,053.56	-1.7%	-3.9%
Ground 90% Bulk, Fresh	525-640	578.00	525-640	578.00	525-640	579.00	0.2%	0.2%
Ground 85% Bulk, Frozen	500-630	589.37	500-795	599.54	535-845	605.36	2.7%	1.0%
Ground 85% Patties, Frozen	565-620	601.96	500-760	625.67	480-767	620.74	3.1%	-0.8%

**source USDA*

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

	Mid-February 2015 Pricing	Mid-March 2015 Pricing	Mid-April 2015 Pricing	Mid-May 2015 Pricing
Tenderloin - Fresh	$52.00 - $59.95	$56.00 - $65.00	$52.00 - $56.00	$52.00 - $56.00
Strip Loin Boneless - Fresh	$32.00 - $34.00	$28.00 - $34.00	$30.50 - $32.00	$30.50 - $32.00
Inside Round - Fresh	$15.45 - $19.50	$15.25 - $19.50	$15.25 - $16.00	$15.25 - $16.95
Ground 90% Bulk Fresh	$13.00 - $13.95	$13.50 - $14.00	No prices reported	$16.00 - $16.95
Fresh Bison Trim	$12.00 - $12.75	$12.50 - $13.50	$12.75 - $14.00	$14.00 - $14.95

**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-May remained at previous month's levels with reports of the occasional sale of Grade A bulls above $5.00 per pound HHW. U.S. buyers offered $4.15 U.S. with returns dependent on exchange rates, quality, and export costs. Canadian buyers paid up to $4.85 per pound HHW for Grade A heifers. U.S. buyers were offering $4.05 U.S. with returns dependent on exchange rates, quality, and export costs.

Nationally, federal slaughter was up 4.0% in the first 17 weeks of 2015 (week ending April 25, 2015) compared to 2014 volumes (3,863 animals in 2015 compared to 3,715 animals in 2014). Live animal exports for the first four months of 2015 were 8,545 head – up by 50% when compared to the 5,688 head exported in the first four 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 in the United States and Canada. There are reports of some orders for ground products being shorted. European demand is steady for middle cuts. There is a small inventory build-up of striploins 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 at present levels if the current exchange rates persist.

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

Chart 1

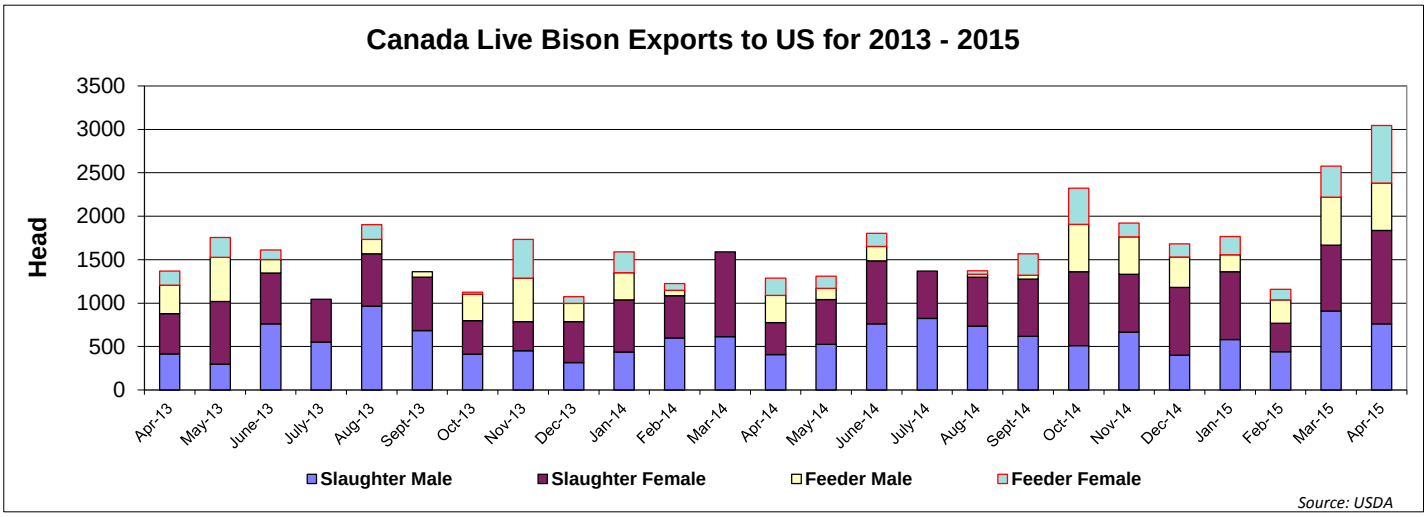
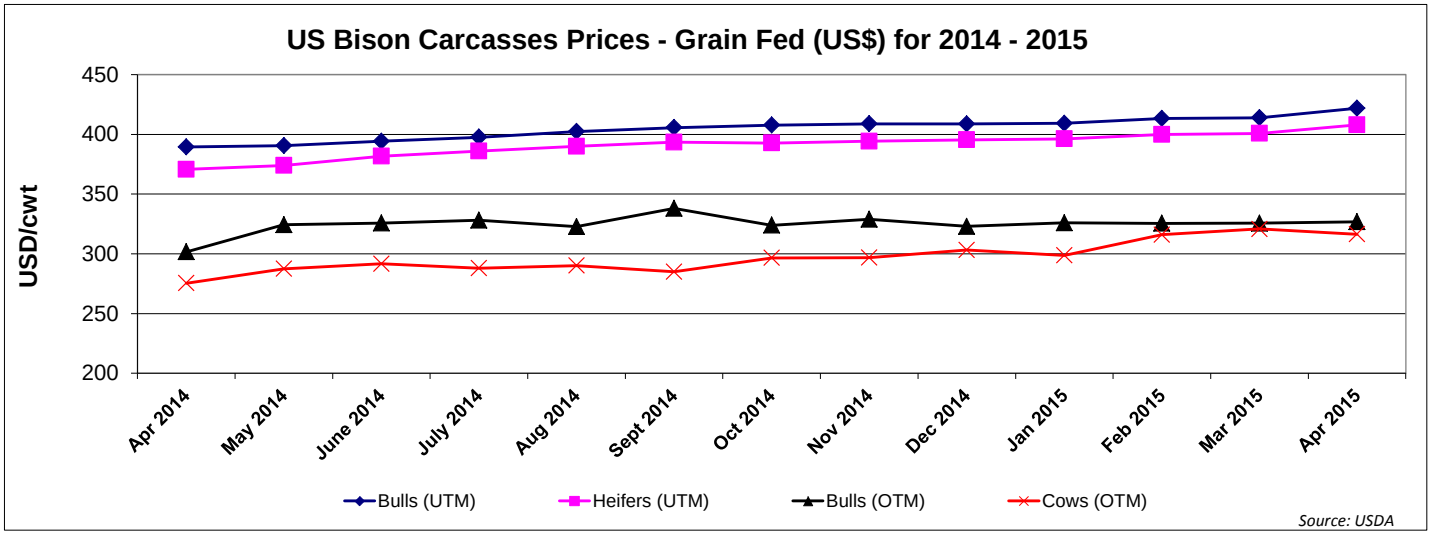


Chart 2



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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