MARKET ANALYSIS REPORT

“A GLOBAL EXPORT MARKET OVERVIEW FOR BRITISH COLUMBIA’S BISON INDUSTRY”
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EXECUTIVE SUMMARY

Of all meat products produced in B.C., bison has some of the best prospects for long-term export growth. Bison meat has all of the characteristics required to be successful in the global meat market of the 21st century: it is a premium, niche product which can be marketed as a high-quality, nutritious meat that is sustainably raised. Bison has less fat, calories and cholesterol than beef, pork or skinless chicken, and its flavourful, sweet, non-gamey taste, combined with its high protein and mineral content, make it an excellent lean-meat alternative. As consumer trends increasingly support a market for naturally-raised meat, growth in the demand for bison meat can be expected to continue into the foreseeable future.

B.C.’s bison herd expanded rapidly over the past two decades, growing from 3,212 bison in 1991 to 12,656 bison in 2006, before experiencing a sharp decline in size. Industry sources report that B.C.’s herd has dropped by over 55% since 2006, with 5,500 head of bison remaining on B.C. farms at the end of 2010.

B.C.’s bison ranchers report the biggest challenge facing the industry’s ability to grow is a lack of access to Crown land for grazing. B.C. is the only jurisdiction in Canada that considers bison “game” instead of “domestic livestock.” The B.C. Game Farm Act confines bison ranching to freehold tenure and prohibits grazing on Crown land. The B.C. bison industry is seeking support for legislative changes to allow bison ranchers the same access to Crown land that cattle ranchers have. Bison ranchers report that until the industry can gain access to more land resources, it is likely their industry will struggle to expand to a level that can support export market development.

B.C.’s bison industry also cites a lack of federally-certified meat processing facilities, which are required for the slaughter of any bison that is destined for international markets, as a challenge. Bison are the most powerful animals in North America and do not like to be confined, creating potentially dangerous situations when they have to be trucked long distances to be slaughtered. Although there is more than enough capacity for federally-inspected slaughter within Canada as a whole, the majority of these facilities are located in Alberta. B.C. does not currently have any federally-inspected facilities for processing bison meat. Bison ranchers believe that in order for B.C. to become competitive in the global bison market, there needs to be at least one federally-inspected facility operational in the Province.

Increased consumer demand for healthy, naturally-grown, environmentally-sustainable food products is driving demand for bison meat in North America and Europe. Bison meat benefits from an excellent nutritional profile, a strong connection to North American history and an environmentally-sustainable production system which appeals to consumers looking for healthy, natural food products. Since 2001, there have been at least 130 different retail products launched worldwide with bison or buffalo meat listed as an ingredient. North America accounted for 91% of these product launches (119 products), Europe accounted for 7% (9 products) and Asia and North Africa each accounted for 1% (1 product each).

The top markets for bison meat exports are the United States, France and Germany. However, it is important to note that the French and German markets were established mostly because of existing trading relationships and there are other markets in Europe – such as Switzerland – that offer great potential for B.C.’s bison-meat exports. It can also be expected that some of the product that is shipped from Canada and the United States to France and Germany is also making its way into neighbouring countries. Other markets offering potential long-term growth opportunities for B.C.’s bison meat exports include Mexico, Qatar and the United Arab Emirates.
The US is the biggest and most well-developed market for bison products outside of Canada. The US market offers the strongest growth prospects for B.C.’s bison exporters due to its proximity, the similarity between Canadian and US consumers, and continually increasing US demand for bison products in both retail and food service. Although a supply shortage has resulted in increased prices for bison meat at the retail and food service levels, consumer demand is still growing despite recessionary conditions that have led to tight budgets. In contrast to the typical beef and veal consumer that traded down to more affordable poultry products over the past two years, bison consumers are still willing to pay extra for the health and environmental benefits associated with eating bison meat. As well, it is expected that demand for bison products will continue to outpace supply for several years in the US, which limits the need to invest in marketing and promotion to find buyers in the market.

Europe is home to the largest and most well-developed markets for bison products outside of North America. The European market has many characteristics that make it attractive to bison exporters: large, concentrated and affluent populations; a strong attraction to indigenous North American history; the requirement for meat to be free of exogenous growth hormones and other additives; a history of hunting and consuming wild game; and consumers that are generally more willing to pay higher prices for healthy foods than their North American counterparts.

France is the second largest economy in Europe and one of the most important food markets in the world. The country ranks first in Europe and third worldwide in overall expenditures on food and related items, and was ranked 5th highest for total expenditures on meat products globally in 2010, behind the US, China, Brazil and Russia. Between 2005 and 2010, France received over one-third of Canada’s bison meat exports. The market for Canadian bison expanded rapidly between 1999 and 2008, rising from 0 to 535 tonnes, but has since declined by 73% to only 145 tonnes in 2010. It is expected that as France’s economy rebounds from the recent recession, consumers will buy less but better-quality meats thanks to the increased level of information being provided by grocery retailers and associations about where meat comes from and the benefits it can provide when consumed as part of a well-balanced diet.

Germany is one of the world’s most prosperous countries, where citizens enjoy a high standard of living and sizeable disposable incomes. With a population of 81.7 million people, Germany is the largest consumer market in Europe and a top destination for food exports from around the world. As a result of an aging population, there is a strong trend in Germany towards living healthier lifestyles which is driving demand for high-quality, natural, low-fat sources of protein, such as bison. The average German consumer spends about 15% less on overall food purchases each year than the average Canadian consumer, yet spends 5-10% more on meat products. It is expected that the post-recession consumption patterns will shift from volume to value, and high-quality meat, organic products and healthy food will be the key trends in Germany’s food market over the next five years. Germany received 9% of the 13,242 tonnes of fresh bison meat exported from Canada since 1996, making it Canada’s third largest market behind the US (44%) and France (39%). Between 2005 and 2008, B.C. exported 655 tonnes of fresh bison meat to Germany worth $5.6 million dollars.

If B.C.’s bison ranchers find a way to reverse the declining size of the bison herd and grow it to a size that can support export market development, the next step in the market development process would be to conduct more extensive research on specific markets. This can involve an in-depth study of consumer behaviour, product distribution, food trends and growth potential in a specific market; attending a tradeshow to meet with prospective buyers; and connecting with Trade Commissioners to get access to timely information on meat distribution, industry contacts and opportunities in the market.
PURPOSE

Building upon the market-information needs identified by the B.C. Bison Association (BCBA), the B.C. Ministry of Agriculture, with support from Agriculture and Agri-food Canada, conducted this study to help B.C.’s bison industry understand the global market for bison products.

The purpose of this report is to:

- identify key trends that are having an impact on the global market for bison products;
- provide insight into what types of bison products are available globally; and,
- identify which markets provide the strongest opportunity for growth for B.C.’s bison meat exports.

INTRODUCTION

In the 15 years since information on bison farming was first collected by Statistics Canada, the number of bison on B.C. farms increased by nearly 300%, rising from 3,212 in 1991 to 12,656 in 2006.¹ Despite this growth, consumer demand for bison meat continues to outpace supply and B.C.’s bison farmers are facing pressure to increase the size of their herds. Although B.C.’s bison industry is not currently in a position to expand its export capacity due to a shortage of supply to meet current demand in the domestic market and a lack of federally-certified meat processing plants in B.C., the BCBA is looking forward to identify where the global bison market is headed so that it can position itself to meet those demands in the medium- to long-term.

Understanding consumer demand and the competitive landscape of the global bison market is the first step to creating an effective long-term export marketing strategy. An effective strategy can help position B.C.’s bison industry to take advantage of emerging opportunities by: setting clear direction for objectives and targets to move the industry forward; identifying resources needed to enable the industry to reach these targets; identifying challenges the industry faces in executing the strategy; and determining how stakeholders can assist in ensuring industry success. The market intelligence provided in this report provides the foundation for a long-term export marketing strategy.

This report begins by providing an overview of the North American bison industry, including a summary of the challenges that are impeding the industry’s ability to grow the bison herd to a size that can support export market development. The report then reviews the key trends affecting global demand for bison meat, followed by an overview of bison products currently found on the market. The report concludes with an analysis of potential markets for B.C.’s bison exports.

This study was funded through the Growing Forward Trade and Market Development for the Canadian Agri-food and Agri-based Products Sector Program.² This program aims to facilitate industry success in global and domestic markets. Through industry-led marketing strategies, a Canada branding strategy, market intelligence and services for exporters, and actions to maintain and improve market access, the program helps equip the sector to seize market opportunities and address emerging challenges.
OVERVIEW OF THE NORTH AMERICAN BISON INDUSTRY

CANADA

Statistics Canada’s 2006 Census of Agriculture, which provides the most recent information available on the size of Canada’s bison herd, indicates that Canada has 195,728 head of bison spread across nearly 1,900 farms. About 95% of bison production is located in the Canada’s four western provinces (see Appendix A). B.C. accounted for 6.5% of Canada’s bison herd in 2006, with 12,656 head of bison. Since 2006, industry sources report that B.C.’s herd has dropped by over 55% to about 5,500 head of bison.

Demand for bison meat continues to outpace supply in Canada, which is driving up prices and putting pressure on ranchers to increase the size of their herds. The average price for Grade A bulls in Canada climbed from $1.65 per pound hot hanging weight (HHW) in 2004 to $3.35 per pound HHW in 2010. Although it is clear that meeting demand is the greatest challenge facing the industry today, bison is not a commodity product – it will take time for farmers to increase the size of their herds because they are not prepared to change the way the species currently thrives in the ecosystem. Bison is a premium, niche product which is marketed as a high-quality, nutritious meat that is sustainably raised. Bison cannot be mass produced in the same way as cattle.

B.C.’s bison ranchers report the biggest challenge facing the industry’s ability to grow is a lack of access to Crown land for grazing. B.C. is the only jurisdiction in Canada that considers bison “game” instead of “domestic livestock.” The B.C. Game Farm Act confines bison ranching to freehold tenure and prohibits grazing on Crown land. The B.C. bison industry is seeking support for legislative changes to allow bison ranchers the same access to Crown land that cattle ranchers have. Bison ranchers report that until the industry can gain access to more land resources, it is likely their industry will struggle to expand to a level that can support export market development.

B.C.’s bison industry also cites a lack of federally-certified meat processing facilities, which are required for the slaughter of any bison that is destined for international markets, as a challenge. Bison are the most powerful animals in North America and do not like to be confined, creating potentially dangerous situations when they have to be trucked long distances to be slaughtered. Although there is more than enough capacity for federally-inspected slaughter within Canada as a whole, the majority of these facilities are located in Alberta. B.C. does not currently have any federally-inspected facilities for processing bison meat. Bison ranchers believe that in order for B.C. to become competitive in the global bison market, there needs to be at least one federally-inspected facility operational in the Province.

UNITED STATES

According to the most recent US Census of Agriculture, there were 198,234 head of bison spread across nearly 4,500 farms in 2007. South Dakota, Nebraska, North Dakota, Colorado and Montana accounted for the majority of the 62,890 bison sold that year, while Texas, Kansas and Oklahoma had the largest number of farms raising bison. Colorado is believed to rank near the top of US bison consumption per capita because of the high penetration of bison products in grocery stores and restaurants.

Like in Canada, consumer demand in the US far outpaces current supply which is leading to increased prices for live bison and bison meat products. Reports from the National Bison Association (NBA) indicate that ranchers have realized price hikes on slaughtered animals of about 36% since 2006, while the average price for a pound of ground bison at the retail level has risen from US$5.30 to US$6.20. Bison steaks generally sell for US$15 –
$20 per pound in the US market.\textsuperscript{11} Current information on total bison meat sales is not available, but the NBA estimates bison meat sales at the restaurant and retail level was about US$239 million in 2006.\textsuperscript{12}

Unlike the beef industry, which processes 100 million cattle a day, the bison industry is still in its infancy and is vulnerable to price and production volatility. To help the bison industry become more economically sustainable, the National Bison Association is working to change regulations that force the bison industry to pay for costs of federal inspection at USDA-regulated processing facilities. Currently, producers of beef, pork, poultry, and seafood receive free access to federal inspection services, while the fees imposed on the bison industry add up to US$75 per head in additional expense.\textsuperscript{13}

**GLOBAL TRENDS**

**SUPPLY & DEMAND**

During the 1990’s, the North American bison industry experienced explosive growth as the cattle industry was facing financial difficulties and many ranchers moved towards alternative livestock production. As more and more ranchers switched over to bison production and competed for animals to build their herds, the price of breeding stock increased and very few animals were headed into the meat market. By 1999, the prices for breeding stock were so high and the bison meat market was so under developed that the industry faced financial collapse.\textsuperscript{14}

More than a decade later, the industry now has a shortage of breeding stock to grow their herds and consumer demand for bison meat continues to grow. The Canadian Bison Association (CBA) reports that demand in Canada has grown between 17 and 20% annually for the past four years and expects that demand will continue to increase as more consumers look for healthy, sustainably-produced meat products. At the same time, the CBA expects that a growth in supply will not happen until 2013 so prices will likely continue on their upward trajectory.\textsuperscript{15}

**HEALTHY – SUSTAINABLE – ORGANIC**

Increased consumer demand for healthy, naturally-grown, environmentally-sustainable food products is driving demand for bison meat in North America and Europe. Bison meat benefits from an excellent nutritional profile, a strong connection to North American history and an environmentally-sustainable production system which appeals to consumers looking for healthy, natural food products. Bison’s flavoursful, sweet, non-gamey taste, combined with its high protein and mineral content, make it an excellent lean-meat alternative. Bison has less fat, calories and cholesterol than beef, pork or skinless chicken.\textsuperscript{16} As consumer trends increasingly support a market for naturally-raised meat, growth in the demand for bison meat can be expected to continue into the foreseeable future.\textsuperscript{17}

**FRESH VS FROZEN**

As a premium, high-value, niche product targeted at health-conscious consumers, almost all of the bison meat sold today is fresh. Historically, frozen meat was the industry standard and processors could meet the needs of their consumers during the summer and fall seasons quite easily. Now that most customers demand fresh bison meat, bison producers are faced with the challenge of having fresh supplies of bison meat available year round. Normally, bison supplies are highest in the late winter and early spring, while demand is highest in the
summer and fall. In order to capitalize on this trend towards fresh meat, bison producers can try to have some of their animals ready later in the year when demand is highest and supplies are limited by backgrounding calves or yearlings on grass.\textsuperscript{18}

**BISON & PET FOOD**

There is a global trend away from processed dog and cat food towards biologically-appropriate foods that are created using high-quality, human-grade ingredients such as bison, chicken, fish, lamb and eggs. Canada’s Champion Pet Foods has capitalized on this trend by launching Orijen Regional Red, a biologically-appropriate dog food that seeks to replicate the balance of fresh meats, fruits, vegetables and grasses that dogs find in their natural environment. Orijen Regional Red uses local, fresh ingredients such as bison, salmon, apples and cranberries, and markets their product to affluent consumers as a healthy alternative to processed dog foods. The Gylcemic Research Institute awarded the Orijen brand the top spot as best pet food on the market in 2009 and 2010, which has led to increased publicity and a growing interest in biologically-appropriate pet foods. As this trend continues to grow, opportunities to supply bison to pet food manufacturers may increase in developed markets.\textsuperscript{19}

**RAISING AMERICAN BISON OUTSIDE OF NORTH AMERICA**

Increased interest in bison meat has resulted in the development of small American bison herds in Europe. The European wood bison (Bison bonasus) roamed wild in Europe for thousands of years until they were hunted to near extinction by the start of the 19\textsuperscript{th} century. Although the European wood bison has been successfully reintroduced to the wild since then, they are considered a highly vulnerable species.\textsuperscript{20} As a result of the growing demand for bison meat in Europe, a Belgian farmer imported American bison (Bison bison) from the US in the 1990s and has since grown his herd to about 250 head of bison. It is estimated that 90\% of the American bison in Europe today descend from this herd.\textsuperscript{21} More recently, farmers began raising American bison in Germany (approximately 40 head of bison), Scotland (40 head of bison) and Bulgaria (12 head of bison).\textsuperscript{22 23 24}

**BISON PRODUCTS**

Generally, bison carcasses are sold to wholesalers who then produce primal-cuts that can be sold to grocery retailers and restaurants through distributors and brokers. These retailers and restaurants can then break these primal-cuts into individual cuts that meet their customer’s needs.\textsuperscript{25}

Bison meat is offered in many different retail product formats, including: ground; canned; jerky; chilli; burgers; meatballs; pepperoni; sausages; steaks; pet biscuits; dry and wet pet food; snack bars; pâté; meatloaf; and frozen prepared meals.\textsuperscript{26}

In addition to the bison meat products available at the food service and grocery retail level, there is potential for cultivating new markets for products made from bison leather, bison fibre and other by-products such as skulls and horns.\textsuperscript{27} The CBA and NBA have begun discussing the prospects of developing these markets but are challenged by the small size and dispersed locations of bison processing facilities.\textsuperscript{28}
According to Datamonitor International’s Knowledge Centre* and Mintel’s Global New Products Database†, there have been at least 130 different retail products launched worldwide since 2001 with bison or buffalo meat listed as an ingredient. North America accounted for 91% of these product launches (119 products), Europe accounted for 7% (9 products), and Asia and North Africa each accounted for 1% (1 product each). Pet foods accounted for 40% of the bison product launches identified since 2001.²⁹

B.C./CANADIAN BISON EXPORTS

LIVE BISON EXPORTS

Of the 114,455 head of bison exported out of Canada in the past five years, 48% were exported from Alberta, 36% from Saskatchewan, 15% from Manitoba and 1% from British Columbia (see Appendix B). The value of Canada’s total live bison exports increased 145.5% between 2006 and 2010, rising from $12.7 to $31.3 million.³⁰

B.C./CANADIAN BISON EXPORTS

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Since 2003, the United States has received 100% of Canada’s live bison exports. Prior to this, Canada also exported live bison to the Netherlands, France and Germany. The Netherlands received 3 live bison from Manitoba in 2003, worth $12,500. France received 16 live bison from Quebec in 1996, worth $47,600; 14 live

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* More information on Datamonitor International’s Knowledge Centre provided here: http://about.datamonitor.com/delivery/kc.htm
bison in 1997 from Alberta and Quebec, worth $25,399; and 20 live bison from Alberta in 2002, worth $62,700. Information on live bison or bison meat exports prior to 1996 is not available, as that was the first year that Statistics Canada began separating bison exports from other bovine exports.  

Since 1996, 100% of the live bison exported from B.C. were sent to the United States. Over the past five years, 83% of the 1,404 head of bison exported from B.C. have entered the US through South Dakota, 7% through North Dakota, 5% through Wyoming and 5% through Colorado (based on US Custom’s Port of Entry). B.C. did not export any live bison to the US in 2009 or 2010, but exported 583 head of bison in 2008 worth $0.53 million (see Appendix C).  

Chart 4: B.C.’s Live Bison Exports to the United States

FRESH BISON MEAT EXPORTS

Of the 5.4 million kilograms of fresh bison meat exported out of Canada during the past five years, 38% was exported to the US, 38% to France, 14% to Germany, 6% to Switzerland and 1% to Mexico. Alberta was the leading exporter during this period (56% of total exports), followed by Quebec (25%), British Columbia (14%), Manitoba (4%) and Saskatchewan (2%). In 2010, Canada exported 836,278 kilograms of fresh bison meat worth $10.0 million (see Appendix B).  

Chart 5: Canada’s Exports of Fresh Bison Meat to All Countries
B.C. exported its first shipment of fresh bison meat in 2000, sending 34 kilograms to Japan. The Province’s fresh bison meat exports grew rapidly during the first half of the decade, before peaking in 2006, at 540,451 kilograms ($3.1 million), and then dropping 58% in 2007, to 209,675 kilograms ($2.3 million). In 2010, B.C. exported 494 kilograms of fresh bison meat worth $5,073, a decline of 99.8% from 2007 (see Appendix C).

Chart 6: B.C.’s Exports of Fresh Bison Meat to All Countries

MARKET GROWTH POTENTIAL FOR BISON MEAT EXPORTS

Since 1996, Canada has exported fresh bison meat to 35 different countries. The United States, France and Switzerland are currently the top three markets for Canadian bison, followed by Germany and Mexico. Chart 7 below shows Canada’s domestic exports of fresh bison meat to these five markets over the past ten years.

Chart 7: Canada’s Top Five Export Markets for Fresh Bison Meat
B.C. exports the majority of its fresh bison meat to Germany, with the remainder going to the US (see Appendix C). Although the United States is clearly the largest market outside of Canada for bison meat products, the CBA has identified France and Germany as strong growth markets for bison products. To connect with buyers in these markets the CBA has provided options to view their website in German, French or English. In addition to these markets that are currently being developed, future long-term growth opportunities may exist in the Middle East and Asia. More extensive research will need to be completed to understand long-term opportunities in countries such as the United Arab Emirates, Qatar, Hong Kong, Japan, China and Russia.

Chart 8: B.C.’s Fresh Bison Meat Exports – Top Two Markets

It can be expected that over the next five to ten years the strongest markets for B.C.’s bison products will be in North America and Europe. Over the past decade significant investments have been made to increase consumer demand for bison meat in these markets. Although new markets – such as the United Arab Emirates – show strong promise for extracting greater value out of bison carcasses due to premium prices for more cuts, developing these markets will require considerable investments in marketing and promotion, a consistent availability of high-value products and time to educate consumers on the benefits of bison meat.35

NORTH AMERICA

United States

The US is the biggest and most well-developed market for bison products outside of Canada. This market offers the strongest growth prospects for B.C.’s bison exporters due to its proximity, the similarity between Canadian and US consumers, and continually increasing demand for bison products in both grocery retail and food service establishments.

The close proximity to the market results in lower transportation costs and the benefit of working within the same time-zone of most buyers in the market. The similarity between Canadian and US consumers is also a benefit because the general expectations of how bison is raised, processed and presented are already well understood by B.C.’s bison ranchers that supply the domestic market and the language barriers that are present in some European countries are not an issue in the US. As well, it is expected that demand for bison products will continue to outpace supply for several years, which limits the need to invest in marketing and promotion to find buyers.
Increased consumer demand for bison products in the US resulted in the strongest year on record for the industry in 2010. In November 2010, ranchers were receiving $3.25/lb for slaughter bulls, which was nearly 35% higher than what they received at the beginning of the year. Although this also resulted in increased prices for bison meat at the retail and food service levels, consumer demand is still growing even during recessionary conditions that have led to tight budgets. In contrast to the typical beef and veal consumer that traded down to more affordable poultry products over the past two years, bison consumers are still willing to pay extra for the health and environmental benefits associated with eating bison meat. Euromonitor’s Global Market Information Database – which provides market information on more than 100 countries worldwide – indicates that natural, organic, grass-fed meats are expected to show the most promising growth in the US market over the next five years. Considering that the average American ate about 65 pounds of beef in 2010 and less than a quarter pound of bison, this market for bison meat still has a lot of room for growth.

**Mexico**

Canada exported 35 tonnes of bison meat to Mexico in 2010, accounting for 4.2% of total exports. B.C. has never exported bison to Mexico, but the market shows promising growth potential in the long term.

Canadian exporters have tariff-free access to the Mexican market through the North American Free Trade Agreement and can leverage established relationships with meat importers and distributors to capitalize on emerging opportunities. In addition, the Canada Brand Initiative launched through Canada’s Economic Action Plan is investing $5 million dollars in promotional activities to boost Mexican demand and raise consumer awareness of Canadian products in that market.

Although the average disposable income of Mexico’s 109 million people was only USD6,500 last year, nearly 10% of households have total disposable incomes exceeding USD55,000. While the lower-income consumers typically consume cheaper poultry products (accounting for 50% of Mexico’s total meat consumption in 2010), there is a growing demand for premium meat products from higher-income consumers in the country.

Many high-end grocery stores and restaurants are looking for healthy, natural, exotic meats, such as bison, that can provide them with a competitive edge for attracting these higher-income consumers. As well, the large tourist areas in southern Mexico provide potential markets for supplying bison meat to food service establishments catering to vacationers from Europe and North America. A challenge in developing the Mexican market will be increasing the awareness of bison, which will require significant investments in marketing and promotion.

**EUROPE**

Europe is home to the largest and most well-developed markets for bison products outside of North America: France, Germany and Switzerland. The European market has many characteristics that make it attractive to bison exporters: large, concentrated and affluent populations; a strong attraction to indigenous North American history; the legislated requirement for meat to be free of exogenous growth hormones; a history of hunting and consuming wild game; and consumers that are generally more willing to pay higher prices for healthy foods than their North American counterparts. Generally, European customers prefer steaks and roasts that are cut from the hindquarters of bison carcasses, which means the Canadian bison industry will need to develop other markets for forequarter cuts that are difficult to sell in Europe.

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* Information on Euromonitor’s Global Market Information Database can be found at: http://www.euromonitor.com/
* Information on the Canada Brand Initiative can be found at: http://www.marquecanadabrand.agr.gc.ca/intro/index-eng.htm
Despite the attractive characteristics of the market, there are still some challenges facing B.C. exporters: European customers have different cutting specifications than are used in North America; there are high tariff barriers for bison meat; transportation costs are higher than exporting to the US or Mexico; and all bison meat destined for countries in the European Union must be processed in an EU-certified facility. As well, European consumers generally refer to all bison meat as buffalo, which makes it difficult for marketers to differentiate American bison meat from the buffalo meat traditionally consumed across Europe, Africa and Asia. The North American bison industry may need to adapt their branding to ensure consumers recognize their products and invest in educating European consumers about the differences between American bison and buffalo meat.

For the European Union, bison is currently lumped in with beef under an 11,500 tonne Tariff Rate Quota that is reserved for “High Quality Beef” imported from Canada and the United States. The tariff rate within the quota is 20%, while all meat that is above the quota faces a tariff rate that varies between 12.8%+176.8 EUR/100kg to 12.8%+303.4 EUR/100kg depending on the type of cut. Meat from bison carcasses grading A1, A2, or A3 is eligible for export to the EU market under this quota. The EU-Canada free trade negotiations may alleviate the challenges that are created by this tariff and support increased demand for bison products in the EU.

It is important to note that while France, Germany and Switzerland are the currently the biggest markets for Canadian bison meat, this is largely because the first Canadian exporters of bison meat to Europe already had established trading relationships with buyers in those markets. Much of the meat that is destined for these markets makes its way into other nearby countries where strong growth opportunities could exist in the long-term.

France

France is the second largest economy in Europe and one of the most important food markets in the world. The country ranks first in Europe and third worldwide in overall expenditures on food and related items, and was ranked 5th highest for total expenditures on meat products globally in 2010, behind the US, China, Brazil and Russia.

The economic situation in France started to deteriorate well before the 2008 global financial crisis, which led to above-average inflation, high-food prices and declining purchasing power. The combination of these factors resulted in a negative impact on meat consumption as consumers scaled back purchases of higher-priced food items. Between 2007 and 2010, total meat sales in France dropped by almost 5%, from 3.46 to 3.31 million tonnes. Poultry was the only meat to experience sales growth during this period, as consumers switched to cheaper cuts of meat. Total beef sales dropped by 7% between 2007 and 2009, before rebounding with 2.4% growth in 2010, from 0.924 to 0.947 million tonnes.

Although pork has traditionally been the most consumed meat in France, the share of total meat sales for pork products dropped from 41% in 2005 to 37% in 2010. During the same period, poultry sales climbed from 26% of total meat sales to 30%. Beef accounts for 27-28% of total meat sales every year. It is expected that as France’s economy rebounds from the recent recession, consumers will buy less but better-quality meats thanks to the increased level of information being provided by grocery retailers and associations about where meat comes from and the benefits it can provide when consumed as part of a well-balanced diet.

Sales of organic products remain comparatively lower than those in other European countries, but are benefiting from nutritional awareness campaigns. The challenge for organic products in France is that they are still too expensive for the majority of French consumers. However, there is a loyal following of higher-income
consumers that have created a niche market for natural, premium meats such as bison. As well, there are over two million North African and Sub-Saharan African immigrants living in France, which is driving demand for Halal fine cuisine. This market is growing by 15% each year and restaurants and grocery retailers are responding by stocking an increasing variety of Halal meats. France’s Halal market generates about USD7.6 billion in annual sales. In order to export Halal bison meat to France, B.C.’s bison industry would need to set up a mechanism to obtain Halal certification that is recognized by consumers in that market.  

Between 2005 and 2010, France received over one-third of Canada’s bison meat exports. The market expanded rapidly between 1999 and 2008, rising from 0 to 535 tonnes, but has since declined by 73% to only 145 tonnes in 2010. As a result, France dropped from being Canada’s highest value bison meat export market in 2008, when nearly $5.8 million worth of bison meat was exported, to the third largest market in 2010, when only $1.8 million worth of bison meat was exported.

With the exception of 3.7 tonnes of bison meat that was exported from B.C. to France in 2006, the Province has not exported any other bison products directly to this market. However, industry sources report that some of B.C.’s bison meat may be making its way to the French market indirectly through exporters in Alberta and the US, where some of B.C.’s live bison are slaughtered and processed. This is likely also the case for other European markets, such as Germany and Switzerland.

Germany

Germany is one of the world’s most prosperous countries, where citizens enjoy a high standard of living and sizeable disposable incomes. With a population of 81.7 million people, Germany is the largest consumer market in Europe and a top destination for food exports from around the world.

As a result of an aging population, there is a strong trend in Germany towards living healthier lifestyles which is driving demand for high-quality, natural, low-fat sources of protein, such as bison. As well, the numerous reports that have been published over the past few years about the quality of food products and the health risks connected with the use of antibiotics in the rearing of animals has led to increasing numbers of Germans becoming more aware of what they are eating and switching to fresh and organic foods. Between 2005 and 2009, organic foods sales grew by 19% in Germany. In addition to the increased demand for fresh and organic foods, there is also growing interest in fair trade and ethically-produced goods.

The average German consumer spends about 15% less on overall food purchases each year than the average Canadian consumer, yet spends 5-10% more on meat products. However, health concerns, swine flu, price fluctuations and the recent recession has resulted in stagnant meat consumption over the past few years. Total meat sales in Germany dropped from 5.1 million tonnes in 2007 to 4.9 million tonnes in 2010. Pork accounted for nearly 65% of all meat sold in Germany in 2010, while poultry accounted for 19% and beef accounted for 14%. Over the past five years the demand for organic meat has increased rapidly, recording 10% growth. It is expected that the post-recession consumption patterns will shift from volume to value, and high-quality meat, organic products and healthy food will be the key trends in Germany’s food market over the next five years.

Germany received 9% of the 13,242 tonnes of fresh bison meat exported from Canada since 1996, making it Canada’s third largest market behind the US (44%) and France (39%). Canada’s fresh bison meat exports to Germany grew rapidly in the first half of the last decade, climbing from 14.8 tonnes in 2001 to 232.7 tonnes in 2006, but have since dropped by almost 99% to only 6.2 tonnes in 2010. As a result, Germany was Canada’s 7th largest market for bison meat in 2010, receiving less than 1% of total exports.
Although Canada exports to the German market have dropped considerably over the past few years, the market still offers great potential in the long term and is an important market for B.C.’s bison meat exporters. Between 2005 and 2008, B.C. exported 655 tonnes of fresh bison meat to Germany worth $5.6 million dollars. B.C. did not export any fresh bison meat to Germany in 2009 or 2010.\(^\text{57}\)

**Switzerland**

Switzerland, a non-EU country located between France, Germany, Austria and Italy, is one of the world’s most stable economies. The country ranked second globally in GDP per capita ($67,156), total food expenditures per capita ($3,585) and total expenditures on meat per capita ($845) in 2010, making it a lucrative market for premium meat products.

Switzerland is known for being extremely protective of its agricultural industry, with high tariffs and extensive domestic subsidisations, which is a key reason why many food exporters choose not to compete in this market. Some of these challenges were reduced for Canadian exporters when Canada signed a Free Trade Agreement with Switzerland through the European Free Trade Association (EFTA) in 2009, but high tariff rates are still present for meat products (159 Swiss Francs, or approximately $185, per 100kg plus a 5% value added tax on fresh bison meat exports).\(^\text{58}\) Despite this, the Swiss market offers great potential for B.C. exporters of premium, high-value bison meat cuts because consumers are willing to absorb the additional costs when offered the highest-quality, naturally-grown meat products.

Since the first shipment of bison was exported to Switzerland in 2000, this market has become increasingly important to Canadian exporters. Canada’s bison meat exports to Switzerland have increased steadily for the past seven years, rising by over 530% from 9.98 tonnes in 2004 to 62.93 tonnes in 2010. Although Switzerland only accounted for 7.5% of the volume of meat exported from Canada last year, it was the second largest market in terms of value, receiving $2.3 million worth of bison meat (23% of the total value of Canada’s meat exports). The average price per kilogram of bison meat exported from Canada to Switzerland in 2010 was $36.02, which was almost four times higher than the US ($9.34), three times higher than France ($12.70) and one and a half times higher than Germany ($21.70).\(^\text{59}\)

Meat, fish and game are generally very expensive in Switzerland, so consumers purchase, cook and eat these products with care. As a result, products that are marketed as high-quality, organic and environmentally-friendly, such as bison meat, are very successful in this market. Switzerland is a pioneering country in organic farming and Swiss consumers are far more educated on the benefits of eating organic meat products than those in North America. Although the high-tariffs make products more expensive for consumers, bison has all of the marketable characteristics that are required to be a success in this market.

**MIDDLE EAST**

The Middle East is a region of increasing importance to food exporters, as it is home to some of the world’s richest countries and largest untapped markets in the developed world. Bison exporters in Canada and the US have indicated that there is long-term potential to supply bison meat to markets in the Middle East, such as the United Arab Emirates and Qatar, but these markets will require significant investments in marketing, promotion and educating consumers on the benefits of eating bison meat.\(^\text{60}\) The Government of Canada showed its support for developing these markets when it provided $81,000 to the Bison Feeder Co-Operative of Saskatchewan in 2009 to establish an online presence and expand retail and food service presence in the Middle East.\(^\text{61}\) More in-depth research will need to be conducted to determine where the greatest long-term opportunities exist for B.C. exporters and how to best develop these lucrative Middle Eastern markets.
CONCLUSION

It is clear that the largest challenge preventing B.C.’s bison industry from capturing the opportunities discussed in this report is a lack of access to land resources. Until B.C.’s bison ranchers have access to the land resources needed to raise these large, free-range animals, it will be difficult to take any further steps to develop export markets.

If B.C.’s bison ranchers find a way to reverse the declining size of the bison herd and grow it to a size that can support export market development, the next step in the market development process would be to conduct further research on specific markets of interest. This can involve an in-depth study of consumer behaviour, product distribution, food trends and growth potential in a specific market; attending tradeshows to meet with prospective buyers; and connecting with Trade Commissioners* to get access to timely information on meat distribution, industry contacts and opportunities in the market.

The Government of Canada regularly assists B.C. exporters interested in exporting to markets in Europe, Asia and North America by funding activities that support market development. In November 2010, the Federal Government announced a $372,000 investment in the Canadian bison industry to help it become more competitive in domestic and international markets. This included a $194,500 investment through the AgriMarketing Program to help the Canadian Bison Association participate in trade shows, advocate for market access and prepare for the 2012 Bison Conference in Quebec, and a $177,760 investment through the Canadian Integrated Food Safety Initiative to continue the development of the Bison Industry Traceability Program.  

More information on how the Federal Government can assist B.C.’s bison industry in taking advantage of emerging export opportunities in the global market can be found on AAFC’s Agri-food Trade Service Website (http://www.ats.agr.gc.ca/intro/index-eng.htm).

* Information on Canada’s Agriculture and Food Trade Commissioner Service can be found at http://www.ats.agr.gc.ca/exp/5610-eng.htm
APPENDIX A: DISTRIBUTION MAP OF FARMED BISON IN CANADA (2006 CENSUS)

Produced by: Remote Sensing and Geomatics Applications (RSGA), Agriculture Division, Statistics Canada, 2008.

Source: 2006 Census of Agriculture.
**APPENDIX B: CANADIAN BISON EXPORTS BY PROVINCE**

### TABLE A: CANADIAN EXPORTS TO THE UNITED STATES – LIVE BISON

<table>
<thead>
<tr>
<th>Province</th>
<th>Unit</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL PROVINCES</td>
<td>$</td>
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<td>$12,743,924</td>
<td>$19,919,393</td>
<td>$28,905,660</td>
<td>$29,898,109</td>
<td>$31,280,765</td>
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<td>$</td>
<td>$1,754,032</td>
<td>$6,857,177</td>
<td>$9,442,016</td>
<td>$15,658,715</td>
<td>$15,193,838</td>
<td>$10,234,376</td>
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<td>$4,032,528</td>
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<td>$9,612,528</td>
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<td>$0</td>
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<td>$527,525</td>
<td>$0</td>
<td>$0</td>
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<tr>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
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<td>25,850</td>
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<td>Alberta</td>
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<td>7,292</td>
<td>10,470</td>
<td>15,436</td>
<td>13,277</td>
<td>8,178</td>
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<td>Saskatchewan</td>
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<td>1,129</td>
<td>3,707</td>
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<td>8,264</td>
<td>12,503</td>
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<td>Manitoba</td>
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<td>177</td>
<td>1,813</td>
<td>2,911</td>
<td>4,664</td>
<td>4,303</td>
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<td>13</td>
<td>36</td>
<td>6</td>
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<td>443</td>
<td>378</td>
<td>583</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Ontario</td>
<td>#</td>
<td>12</td>
<td>0</td>
<td>0</td>
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(Source: Global Trade Atlas, May 2011)

### TABLE B: CANADIAN EXPORTS TO ALL COUNTRIES – FRESH BISON MEAT

<table>
<thead>
<tr>
<th>Province</th>
<th>Unit</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
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<tbody>
<tr>
<td>ALL PROVINCES</td>
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<td>$12,366,004</td>
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<td>$10,623,616</td>
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<td>$11,701,496</td>
<td>$5,979,563</td>
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<td>$</td>
<td>$2,147,318</td>
<td>$2,264,344</td>
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<td>$632,220</td>
<td>$3,147,949</td>
<td>$2,343,421</td>
<td>$253,141</td>
<td>$42,544</td>
<td>$5,073</td>
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<tr>
<td>Manitoba</td>
<td>$</td>
<td>$3,173,748</td>
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<td>ALL PROVINCES</td>
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<td>2,148,187</td>
<td>1,591,568</td>
<td>1,045,652</td>
<td>1,084,936</td>
<td>866,710</td>
<td>836,278</td>
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<td>Alberta</td>
<td>Kg</td>
<td>1,255,336</td>
<td>677,264</td>
<td>476,236</td>
<td>664,382</td>
<td>634,252</td>
<td>570,208</td>
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<tr>
<td>Quebec</td>
<td>Kg</td>
<td>273,107</td>
<td>217,697</td>
<td>289,415</td>
<td>358,172</td>
<td>220,222</td>
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<tr>
<td>Ontario</td>
<td>Kg</td>
<td>2,527</td>
<td>886</td>
<td>0</td>
<td>0</td>
<td>937</td>
<td>4,361</td>
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<td>Saskatchewan</td>
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<td>35,683</td>
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<td>3,051</td>
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<td>Manitoba</td>
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<td>556,896</td>
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<td>64,802</td>
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(Source: Global Trade Atlas, May 2011)
## APPENDIX C: BISON EXPORTS FROM BRITISH COLUMBIA

### TABLE C: B.C. EXPORTS TO ALL COUNTRIES – ALL LIVE BISON AND BISON MEAT

<table>
<thead>
<tr>
<th>HS #</th>
<th>Description</th>
<th>Unit</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>--</td>
<td>TOTAL BISON EXPORTS</td>
<td>$</td>
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<td>$3,493,502</td>
<td>$2,643,445</td>
<td>$780,666</td>
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<td>$5,073</td>
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<tr>
<td>01029020</td>
<td>Live Bison</td>
<td>$</td>
<td>$52,289</td>
<td>$345,553</td>
<td>$300,024</td>
<td>$527,525</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>#</td>
<td></td>
<td>62</td>
<td>443</td>
<td>378</td>
<td>583</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>$/#</td>
<td></td>
<td>$843.37</td>
<td>$780.03</td>
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<td>$904.85</td>
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<td>02013010</td>
<td>Fresh Bison, Boneless</td>
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<td>$625,227</td>
<td>$3,046,453</td>
<td>$2,087,585</td>
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<td>$5,073</td>
</tr>
<tr>
<td></td>
<td>Kg</td>
<td></td>
<td>59,219</td>
<td>489,879</td>
<td>156,065</td>
<td>19,671</td>
<td>3,793</td>
<td>494</td>
</tr>
<tr>
<td></td>
<td>$/Kg</td>
<td></td>
<td>$10.56</td>
<td>$6.22</td>
<td>$13.38</td>
<td>$12.61</td>
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<tr>
<td>02012010</td>
<td>Fresh Bison, Bone In</td>
<td>$</td>
<td>$6,993</td>
<td>$101,496</td>
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<td>$0</td>
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<tr>
<td></td>
<td>Kg</td>
<td></td>
<td>1,102</td>
<td>14,572</td>
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<td>540</td>
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<td>0</td>
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<tr>
<td></td>
<td>$/Kg</td>
<td></td>
<td>$6.35</td>
<td>$6.97</td>
<td>$4.77</td>
<td>$9.45</td>
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</tr>
</tbody>
</table>

(Source: Global Trade Atlas, May 2011)

### TABLE D: B.C. EXPORTS BY DESTINATION – FRESH BISON MEAT

<table>
<thead>
<tr>
<th>Destination</th>
<th>Unit</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL COUNTRIES</td>
<td>$</td>
<td>$632,220</td>
<td>$3,147,949</td>
<td>$2,343,421</td>
<td>$253,141</td>
<td>$42,544</td>
<td>$5,073</td>
</tr>
<tr>
<td>United States</td>
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<td>$270,790</td>
<td>$119,043</td>
<td>$25,065</td>
<td>$42,544</td>
<td>$5,073</td>
</tr>
<tr>
<td>Germany</td>
<td>$</td>
<td>$354,774</td>
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<td>$2,208,860</td>
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<td>$0</td>
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<td>$</td>
<td>$0</td>
<td>$10,873</td>
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<td>$0</td>
<td>$0</td>
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<td>Netherlands</td>
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<td>$27,919</td>
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<td>$0</td>
</tr>
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<td>$0</td>
</tr>
<tr>
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<td>$5,457</td>
<td>$0</td>
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<td>$0</td>
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</tbody>
</table>

(Source: Global Trade Atlas, May 2011)

Note: Canadian exports are reported on FOB basis, which refers to the price of merchandise on the border or at a national port.
ENDNOTES

4 BC Bison Association, April 2011
6 BC Bison Association, April 2011
7 BC Bison Association, April 2011
14 Canadian Bison Association, April 2011
22 BC Bison Association, April 2011
35 Canadian Bison Association, April 2011
58 “Swiss Working Tariff,” Federal Customs Administration, http://xtares.admin.ch/tares/login/loginFormFiller.do;jsessionid=JrgzhNx942YBpvmkhLZ1JRXg56psR5RJy9nGF9nY3vkHdpVHXxH!2031288033, accessed May 2011
60 Canadian Bison Association, April 2011