



Annual Report: 2015





Lessons Learned

Strength and stability.

Those two words describe today's bison business.

Prices that ranchers large and small are receiving for the animals they bring to processors, and to farmers' markets, are pegged at all-time highs. When bison meat prices rapidly began rising a decade ago, critics scoffed that customers would never pay the premiums required to support those prices.

Our customers knew something that the critics overlooked. They knew that bison meat was exceptionally healthy, with high protein and low fat profiles that fit their dedication to a healthy diet.

They appreciated that bison meat was raised in a sustainable manner, with no growth hormones, and no growth-promoting antibiotics.

And, they were rapidly discovering that bison meat is really delicious. They also recognized that healthy, sustainable, and delicious food had value that aligned with their personal values.

The traditional marketplace identifies shoppers as "consumers." We produce...they consume.

Bison meat sales are climbing because we recognize that a true marketplace is built upon relationships and respect. The growing number of people choosing bison in retail cases, and on restaurant menus, aren't just consumers, they are our customers. Or, to be a little more exact, they are our partners in restoring bison to the private lands across North America by providing profitable opportunities for farmers and ranchers.

Bison meat now accounts for more than \$340 million in retail and restaurant sales. Pet food companies are actively pursuing bison ingredients. Bison fiber is finding new uses in clothing, and even headwear.

As the market grows, so will the National Bison Association's work to represent our members.

In 2015, The NBA worked with our sister organization, the Canadian Bison Association, to successfully eliminate the branding requirements for bison brought into the United States from Canada. Throughout the year, we promoted bison ranching opportunities at the national conventions of the FFA and the National Association of Farm Broadcasting. We participated in the largest national gathering of food bloggers to make sure that our message is getting out to the public. And, as 2015 came to a close, we moved one step closer to getting bison recognized as America's National Mammal with the Senate passage of the National Bison Legacy Act.

We continue to develop new resources for ranchers and marketers to improve their professional capabilities as well. Through the financial support from USDA's North Central SARE (Sustainable Agriculture Research and Education), and USDA's Risk Management Agency, we produced the 2nd Edition *Bison Producers' Handbook* with a wealth of new information and resources. And, we expanded the on-line curriculum for beginning bison producers.

This 2015 annual report summarizes the key accomplishments of the NBA over the past year.

Our future success will require even more attention to consumer promotion, producer recruitment, and public policy involvement. The National Bison Association is the voice of American buffalo producers. Your membership commitment keeps that voice strong.

All the Best,

Dave Carter
Executive Director

A strong business built on quality

Bison producers and marketers today are enjoying an unprecedented period of market strength and stability. An expanding segment of the American public is discovering daily that bison meat brings to their table the perfect balance of great taste, great nutrition, and a product that is produced with respect for nature.

The National Bison Association stands at the forefront of conveying this message to the public. As demand grows, the association is also the leading voice to assist new producers in getting a start in the business. And, the association is the recognized voice of American bison producers in the public policy arena and the national news media.

Our Economic Picture:

Demand for bison meat has soared over the past decade, and continues to test the availability of market ready animals.

According to the National Bison Association's economic analysis, the bison business now records more than \$340 million in annual sales in retail outlets and restaurants.

2015 closed with young bison bull carcass prices edging \$4.25/lb. and heifer carcasses near \$4.10/lb. Prices reached historic highs in 2015, but have been near those levels for more than five years.

USDA Monthly Bison Report Summary

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	Dec-15 Weighted Avg.	Dec. 14 Weighted Avg.	Dec. 11 Weighted Avg.	One Year % Difference	Five Year % Difference
WHOLESALE PRICES					
Young Bulls	\$4.25	\$4.09	\$3.98	4%	7%
Young Heifers	\$4.13	\$3.95	\$3.84	4%	8%
Aged Bulls	\$3.64	\$3.22	\$2.99	13%	22%
Aged Cows	\$3.70	\$3.03	\$2.91	22%	27%

Source: USDA AMS Grain and Livestock Market Reporting Service

Burgeoning consumer demand and favorable growing conditions in the heart of the bison-production regions—have prompted ranchers to build their herds. This, in turn, is creating strong market prices for live bison throughout the United States.

The bison marketplace over the past five years has been a picture of stability, in comparison to the commodity livestock markets.

Avg. Bison Carcass Price vs. Beef Carcass 2008-2016 (Cwt.)



A traditional meat for modern lifestyles

Spreading the word on the quality of the meat and the dedication of the ranchers who produce it.



The National Voice Promoting Bison Meat – The National Bison Association is recognized by the nation’s media as the go-to source for reliable, accurate information about all aspects of bison meat, and bison production. The National Bison Association was quoted in national publications, including the *New York Times*, and *USA Today*, and on *CNBC*, *The Food Network* and other media outlets.

New Social Media Focus – With help from the resources provided by the association’s voluntary checkoff program, the National Bison Association began developing a coordinated Social media campaign, with emphasis on the tools and messages attuned for the next generation of shop-

pers. We sponsored three nationally-known food bloggers to visit local bison ranches, and helped conduct a workshop at the nation’s largest gathering of female food bloggers.

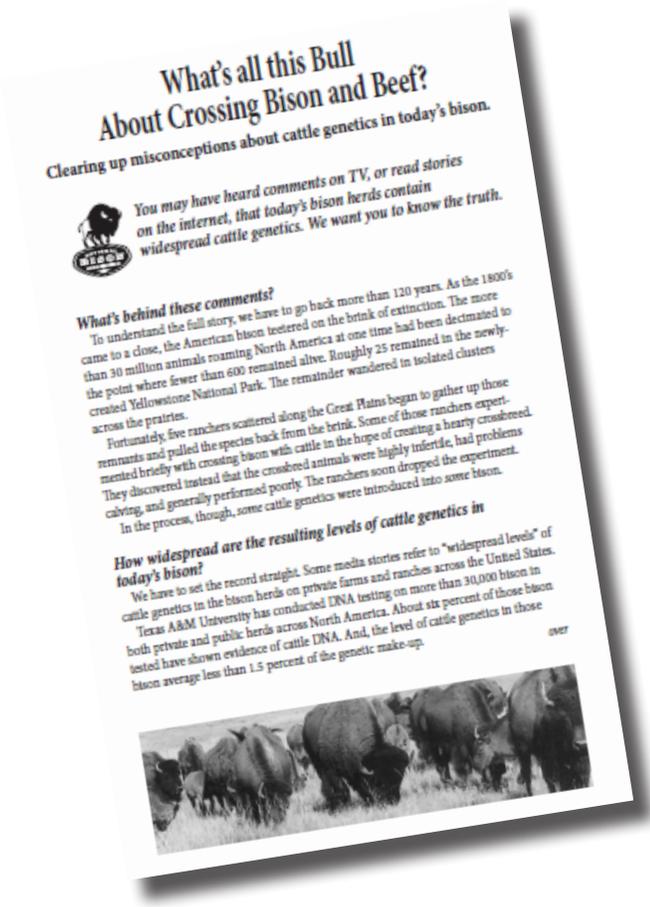
Special Publications For Bison Marketers – the annual *Bison World* food supplement is utilized by marketers throughout the industry. The Why Bison pamphlet continues to serve as a brief informative brochure and special recipe cards are available to marketers’ throughout the business.

BisonFinder App – Thanks to the National Bison Association, consumers can now download a free app on their smartphones and tablets to help them find nearby restaurants, ranches, and grocery stores that offer delicious, wholesome bison.

Establishing National Bison Day – In cooperation with the Wildlife Conservation Society and the Inter Tribal Buffalo Council, the NBA successfully lobbied the U.S. Congress to designate the first Saturday in November as National Bison Day. This event draws media attention to bison, just as the important holiday entertaining season gets underway.

Setting the Record Straight – The NBA helps protect the bison industry from inaccurate and misleading reports about widespread crossbreeding of bison with cattle. The association’s work included developing and distributing its *What’s All the Bull about Beef in Bison?* brochure to retailers, media outlets, producers and consumers.

Slow Meat USA – The National Bison Association cooperates with Slow Meat USA to encourage the public to look for quality, ethically produced meat, rather than simply focusing on price.



Resources at the ready

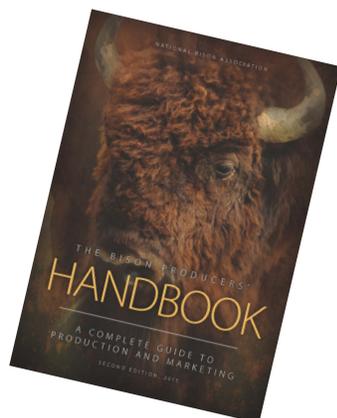
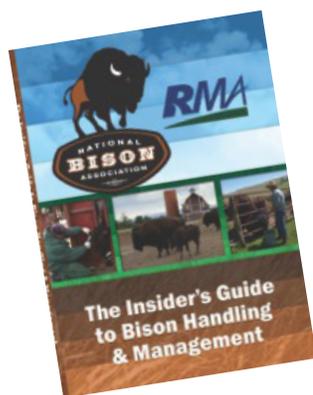
A new 300-page handbook published by the National Bison Association in 2015 is only one example of the cutting-edge resources the association is developing to help producers and marketers build success in the bison business. Those resources include:

2nd Edition Bison Producers' Handbook – This 300-page book was updated and expanded in 2015, with new information provided by producers, processors and marketers with a wealth of experience. This handbook is widely recognized as the definitive source of information for all aspects of production and marketing.

Insider's Guide to Bison Handling and Management – This 40-minute DVD—produced with the assistance of USDA's Risk Management Agency—contains eight “chapters” with technical information and visual demonstrations of all aspects of bison handling and business management.

Bison 301 – In conjunction with the 2nd Edition Bison Producers' Handbook, the new Bison 301 on-line curriculum offers in depth studies, exercises and other resources to ag educators, extension agents and new farmers and ranchers.

Bison 201 and 101 – The Bison 201 on-line curriculum features in-depth information for new products, and includes interactive worksheets, videos and other material. It is an extension of the Bison 101 introductory on-line course that was introduced a few years ago.



The NBA offers valuable tools for newcomers and veterans alike.

Sustainable Agriculture Research & Education (SARE) – The National Bison Association coordinated the development of a consortium of organizations and individual ranches to administer a two-year project to: a) Develop a bison-specific curriculum for educators and Extension agents; b) research specific pasture-management protocols; and c) develop a Best Practices manual for producers.

Risk Management Agency (RMA) Partnership – Similarly, the National Bison Association has partnered with the USDA Risk Management Agency to begin developing new benchmarking tools and other educational resources for producers.

Gold Trophy Show & Sale – As the name implies, this is the nation's premier stage for producers to buy the finest bison in North America to improve the quality and profitability of their herds.

Nationwide Insurance Program – In 2012, the NBA began working with Nationwide Agribusiness to develop risk management tools specifically for bison producers. In 2015, we continued that partnership with a commitment to enhance and expand coverage.

I just finished reading the entire handbook. I've been messing around with buffalo for 20 years and almost on every page in the handbook I was learning something new.

Fantastic piece of work!!

*Vance Forepaugh
Medicine Wheel Ranch, NE*

Public policies for producers

NBA's leadership is shaping the public policies that directly impact the incomes, and the sustainability, of the bison business.

Herd Health –The NBA collaborates with the National Buffalo Foundation to support research into the critical herd health issues. In 2015 the NBA helped to sponsor the 1st International Bison Herd Health Symposium and worked with Turner Enterprises, Inc. to help distribute the only bison-specific *M. bovis* vaccine to NBA members in a cost-effective manner.

Bison 2014 Study – The USDA is completing a comprehensive epidemiological study of American bison, which was launched at the request of the NBA. This study will help focus public resources on issues important to bison producers.

Cross Border Issues – At the request of the NBA and Canadian Bison Association, the U.S. and Canadian governments agreed in early 2015 to eliminate the requirement that bison imported from Canada be branded.

Regulatory Monitoring – The NBA works with regulatory agencies to make sure new federal rules don't create undue problems and/or competitive disadvantages for our industry.

USDA Price Reporting & Data Collection – The USDA monthly wholesale bison report--established at the request of the NBA--is a valuable tool for producers, processors, and marketers. That report now includes grass-finished bison and specific offal items.

Endangered Species – The NBA actively works with the U.S. Fish and Wildlife Service to assure that misguided efforts by some groups not hinder the continued restoration of bison to the American landscape via private ranching.

Opening Asian Markets – At the request of the NBA, the USDA Foreign Agricultural Service has formally petitioned the government of Korea to reopen its market to U.S. bison meat. FAS has



U.S. Sen. John Hoeven (R-ND) dekuvers a copy of the Bison Legacy Act to the National Buffalo Museum, in Jamestown, N.D. after the Senate passed the legislation in December.

Bison Legacy Act – At the urging of a coalition comprised of the National Bison Association, the Inter-Tribal Buffalo Council, and the Wildlife Conservation Society, the U.S. Senate in December unanimously voted to designate bison as the National Mammal of the United States. In 2016, we will be working to win House passage as well.



agreed to file a similar petition with the government of Japan. In addition, the Trans-Pacific Trade agreement completed in 2015 provides bison with the same tariff reduction steps as beef at such a time that the Japanese market reopens to bison.

Addressing EU Customs Issue – When customs officials in Germany began misclassifying bison meat last September—resulting in a significant tariff rate hike—the NBA enlisted the USDA Foreign Agricultural Service to work with the European Commission to successfully resolve the issue.

Leveling the Playing Field in Europe—U.S. negotiators have pledged to work to eliminate the current 20% tariff that hinders the growth of bison meat exports to Europe.

Agricultural Trade Advisory Committee—The National Bison Association is represented on the USDA Agricultural Trade Advisory Committee, which provides important grassroots input to the Secretary of Agriculture and the U.S. Trade Representative.

Outreach on all things bison

In a world of commodity agriculture and mass-produced food, bison stand out as something unique. We continue to grow because of a commitment to animals--and food-produced right; with a respect for husbandry and the ecosystem we inhabit.

Public Relations – The NBA is the leading national voice for bison producers. The public relations activities of the NBA have resulted in positive media coverage in the *New York Times*, *Associated Press*, *National Public Radio*, *CNBC*, *Huffington Post*, *USA Today*, *Wall Street Journal* and several other important media outlets.

Cooperation with the Tribal Community – The NBA in 2014 signed a formal Memorandum of Agreement with the Inter Tribal Buffalo Council to outline areas in which the two organizations will work together to restore bison to more rangelands, and to promote bison in the marketplace.

Cross-Border Collaboration – The National Bison Association and the Canadian Bison Association work together in many capacities to build stability and profitability for bison producers across North America.

Voice for Conservation on Private Ranches – The NBA continues to collaborate with leaders in the conservation community to address issues that cut across private and public herds. The association's Conservation Committee is developing guidelines for conservation ranching, and the North American Bison Registry now offers a Conservation Herd recognition program.

Farm Broadcasters – The NBA again participated in the Trade Talk event at the National Association of Farm Broadcasters' annual meeting. The association conducted more than 30 media interviews and developed important relationships with key farm broadcasters.

New Materials for Lenders – New NBA developed and distributed new materials to inform agricultural lenders about the strength and stability that make today's bison business a sound investment.

Outreach to the Next Generation – The National Bison Association's booth at the national FFA convention continues to introduce the next generation of producers to the bison advantage. We utilize the convention to connect students and Ag advisors with seasoned bison producers through our student group membership program.

Conferences – The 2015 NBA Winter Conference brought together nearly 400 producers and marketers for three days of education, networking and fun. This was the highest winter conference attendance in more than a decade. The summer conference, in Fort Worth, Texas, offered an early-summer getaway, with fantastic speakers, culinary events and plenty of fellowship.

Junior Judging – Now in its eighth year, the NBA Junior Judging Contest drew participation from around the country. Three scholarships were awarded at the 2015 Junior Judging contest at the National Western Stock Show in January.

Our experience with the NBA began in 2009.

We now own a small acreage ranch raising bison, sell bison meat at the local farmers' market, and have even begun to breed the Bison to increase our herd. The NBA has been an invaluable source of information, marketing products, inspiration and continued support. Without the help of the NBA and its members, none of this would have been possible for us.

Our sincere thanks to the NBA.

*Jeff and Tracy Herrick,
JT Ranch/Black Rock Bison*

It pays to belong to the NBA

Weekly Update – The National Bison Association's Email Weekly Update is the most widely read news service in the buffalo business.

NBA Trading Board – NBA members get a 48-hour advance look at any item on the Trading Board before ads are published on the website.

Bison World – Our quarterly magazine is packed with valuable ranching advice, news about the business, public policy information, and advertising that helps you find the goods and services you need.

Online Education – Our online Bison 101, 201 and 301 curriculum are only available for NBA members. And, Bison 201 contains valuable interactive worksheets that can help you develop your bison business plan.

Bison Producers' Insurance Coverage – The National Bison Association worked with Nationwide Agribusiness to develop new products and services specifically tailored to the needs of producers and marketers.

Conferences – Our Winter and Summer Conferences are forums for picking up new information, making important connections, and enjoying being a part of the buffalo community.

Gold Trophy Show and Sale – This annual event offers producers the opportunity to buy premier breeding stock to improve and expand their herds.

Junior Judging – The NBA Junior Judging Contest is drawing increased participation from around the country.



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