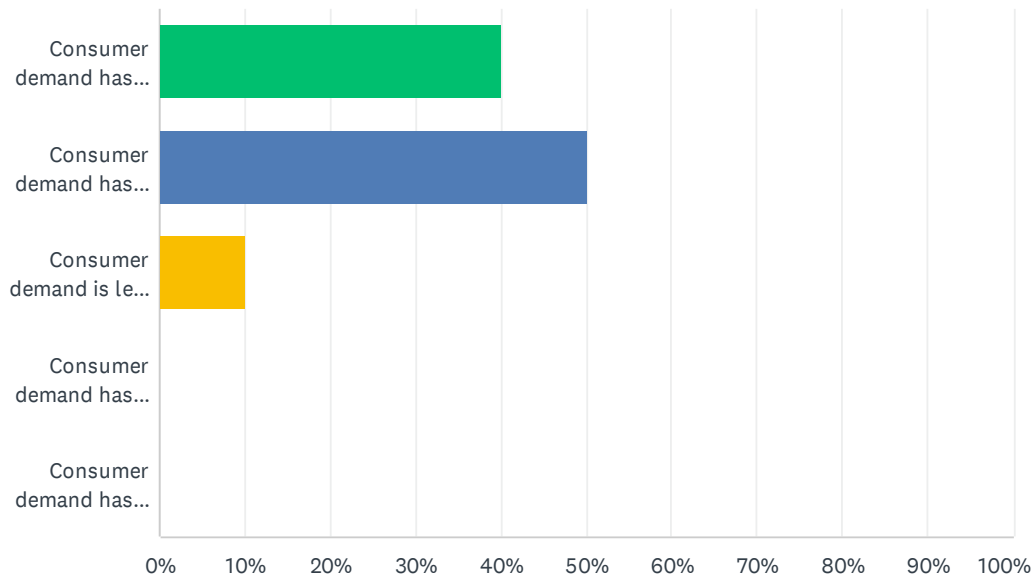


## Q1 How has consumer demand changed for bison since November 2020?

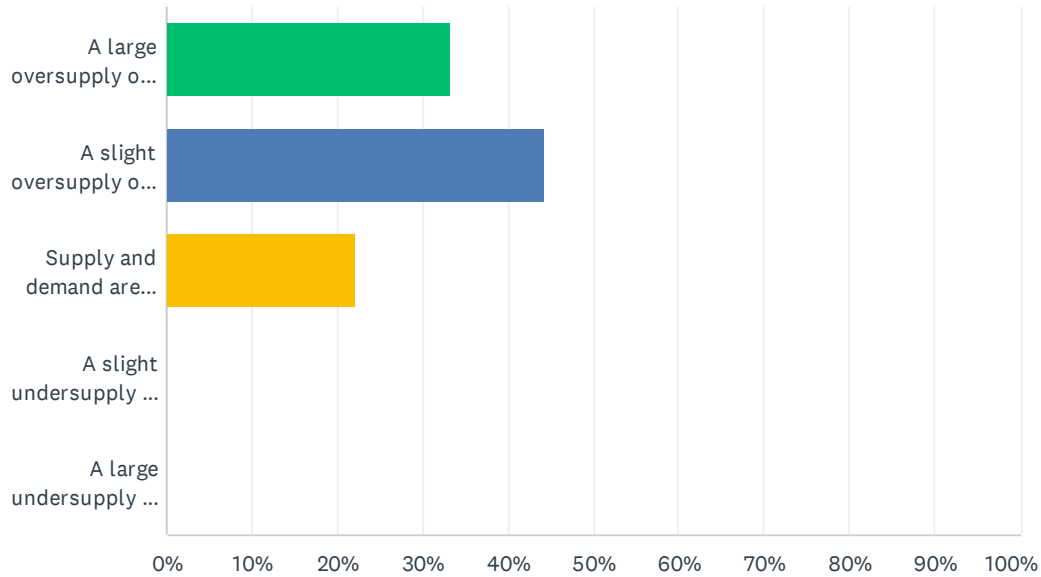
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Consumer demand has increased more than 10%	40.00%	4
Consumer demand has increased 1-9%	50.00%	5
Consumer demand is level with November 2019	10.00%	1
Consumer demand has declined 1-9%	0.00%	0
Consumer demand has declined more than 10%	0.00%	0
<b>TOTAL</b>		<b>10</b>

## Q2 What is the supply of animals available for processing for the commercial marketplace?

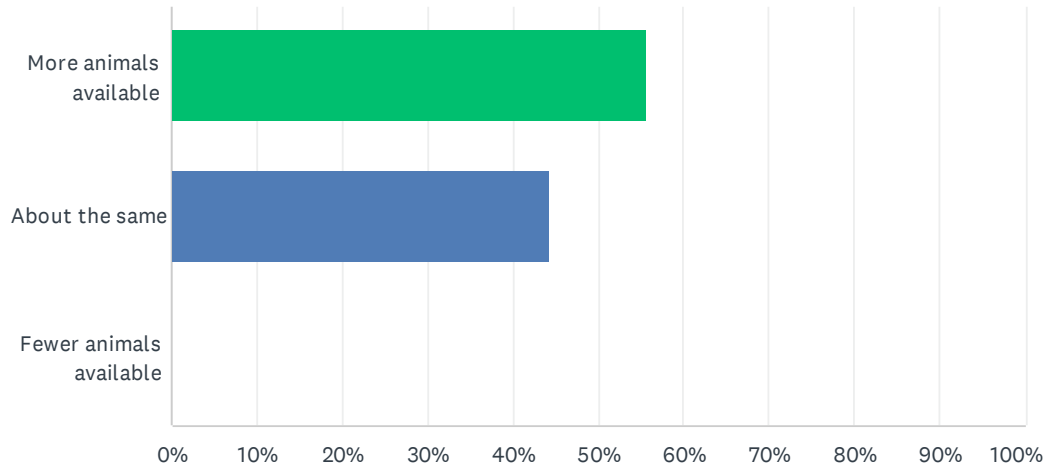
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
A large oversupply of animals available for processing.	33.33%	3
A slight oversupply of animals available for processing	44.44%	4
Supply and demand are roughly in balance	22.22%	2
A slight undersupply of animals available for processing	0.00%	0
A large undersupply of animals available for processing	0.00%	0
<b>TOTAL</b>		<b>9</b>

### Q3 What do you see in regard to the available supply of finished bison in the next three months?

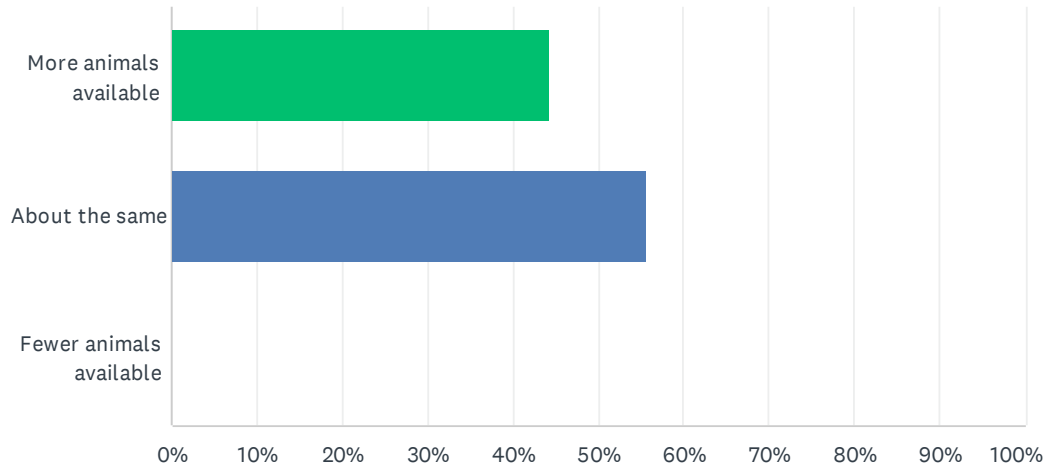
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
More animals available	55.56%	5
About the same	44.44%	4
Fewer animals available	0.00%	0
<b>TOTAL</b>		<b>9</b>

## Q4 What do you see in regard to the available supply of finished bison in the next 4 - 6 months?

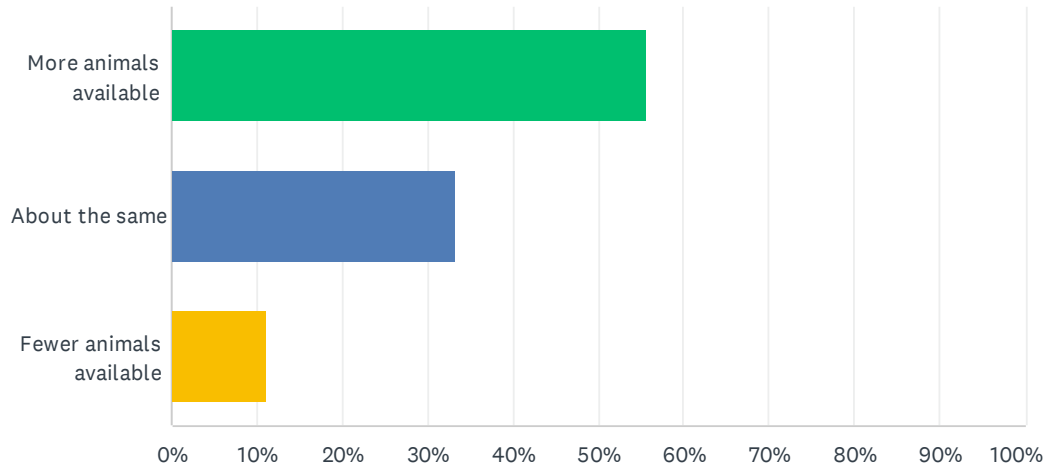
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
More animals available	44.44%	4
About the same	55.56%	5
Fewer animals available	0.00%	0
<b>TOTAL</b>		<b>9</b>

## Q5 What do you see in regard to the available supply of finished bison in the next 7 - 12 months?

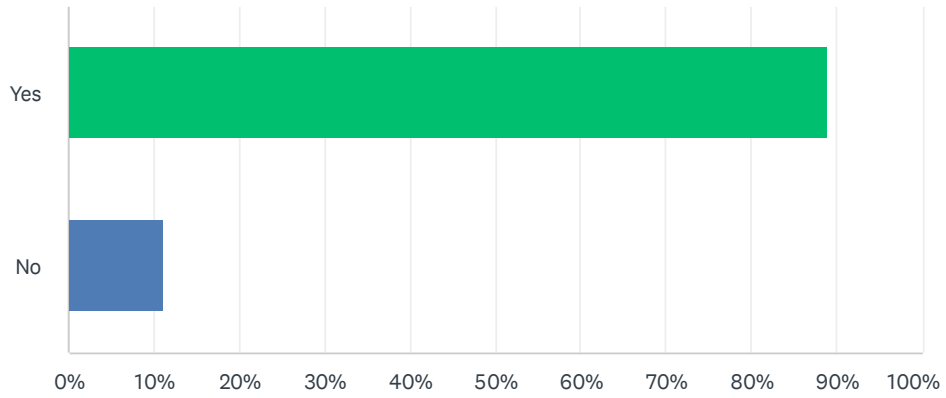
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
More animals available	55.56%	5
About the same	33.33%	3
Fewer animals available	11.11%	1
<b>TOTAL</b>		<b>9</b>

## Q6 Are you able to supply new customers with product?

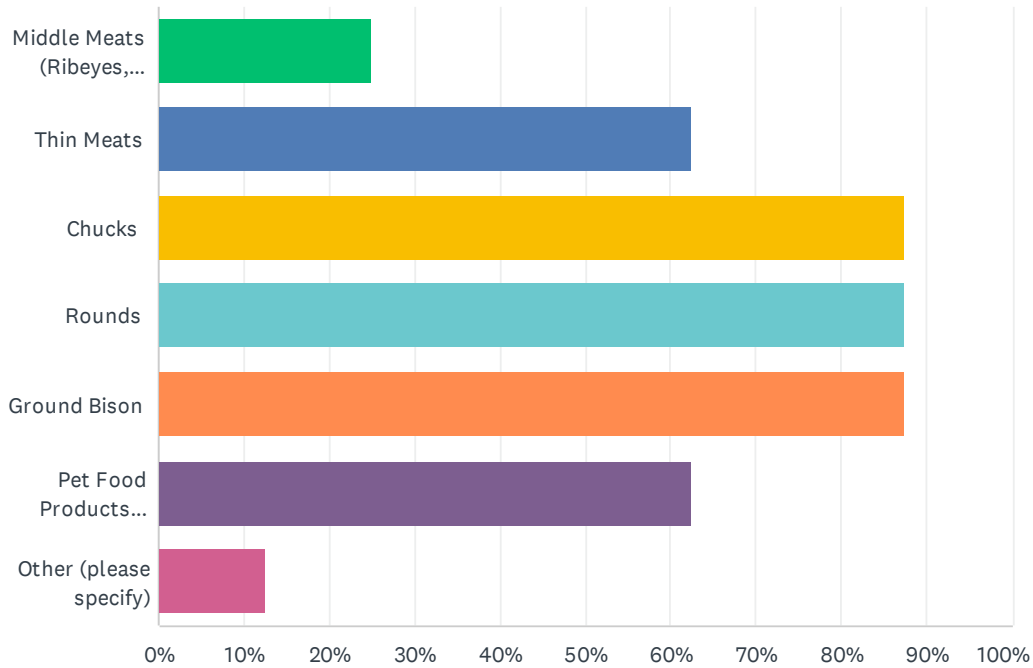
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	88.89%	8
No	11.11%	1
TOTAL		9

## Q7 If "Yes" to previous question, what cuts are you able to supply

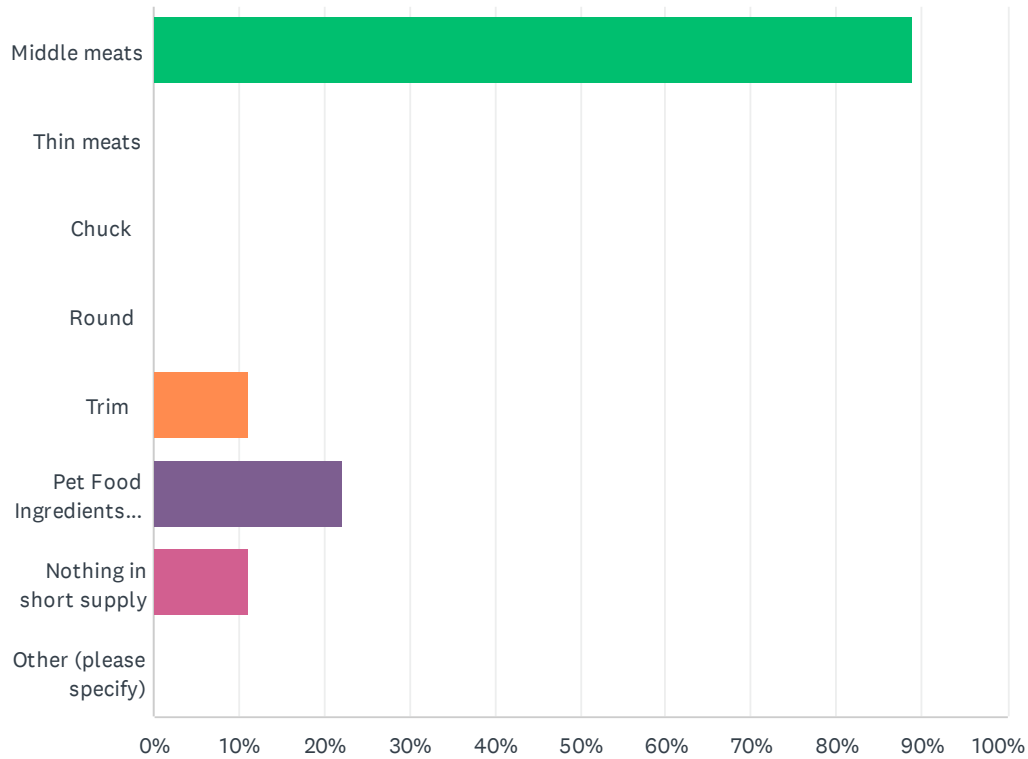
Answered: 8 Skipped: 2



ANSWER CHOICES	RESPONSES	
Middle Meats (Ribeyes, Strips, Tenderloin, Sirloin)	25.00%	2
Thin Meats	62.50%	5
Chucks	87.50%	7
Rounds	87.50%	7
Ground Bison	87.50%	7
Pet Food Products (hearts, livers, etc.)	62.50%	5
Other (please specify)	12.50%	1
Total Respondents: 8		

## Q8 For which meats has demand exceeded supply over the past year? (check all that apply)

Answered: 9 Skipped: 1

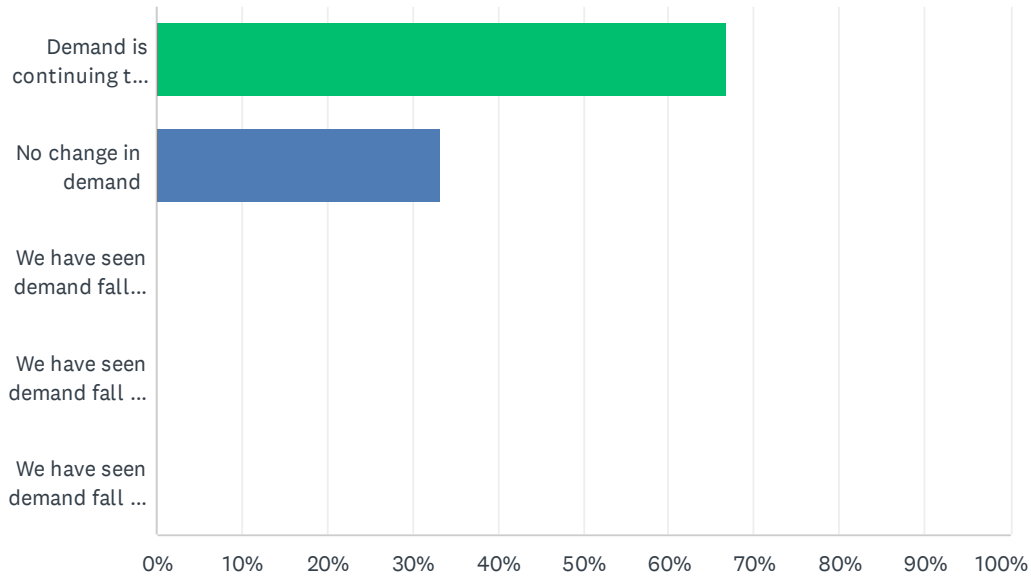


ANSWER CHOICES	RESPONSES	
Middle meats	88.89%	8
Thin meats	0.00%	0
Chuck	0.00%	0
Round	0.00%	0
Trim	11.11%	1
Pet Food Ingredients (heart, liver, etc.)	22.22%	2
Nothing in short supply	11.11%	1
Other (please specify)	0.00%	0
Total Respondents: 9		



## Q9 What impact is the current pricing having on the demand from your existing customers?

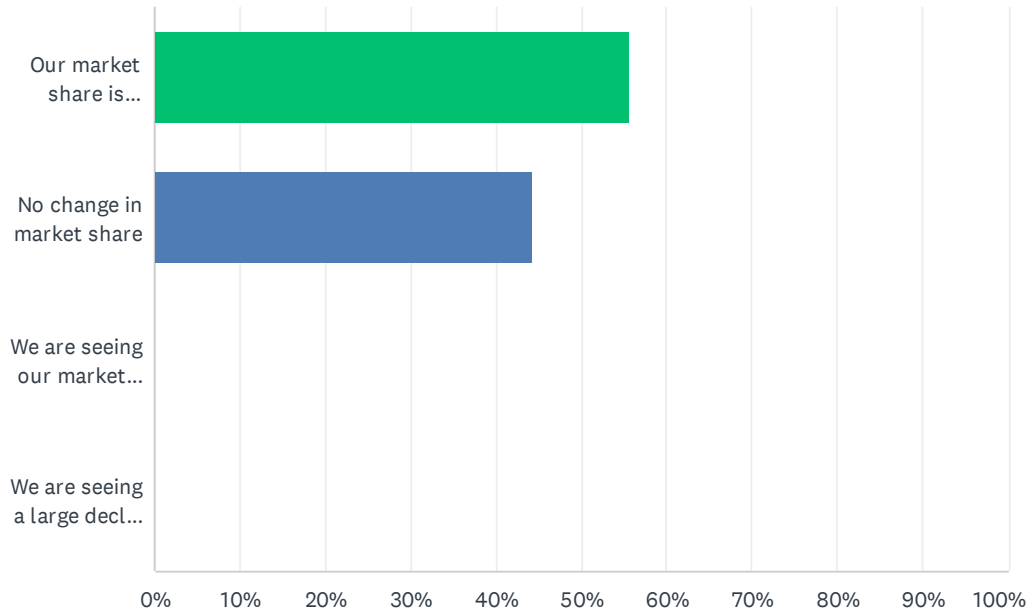
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Demand is continuing to increase	66.67%	6
No change in demand	33.33%	3
We have seen demand fall from 1-5%	0.00%	0
We have seen demand fall by 6-10%	0.00%	0
We have seen demand fall by more than 11%	0.00%	0
<b>TOTAL</b>		<b>9</b>

## Q10 What impact is the current supply/price situation having on the market share for bison vs. other red meats?

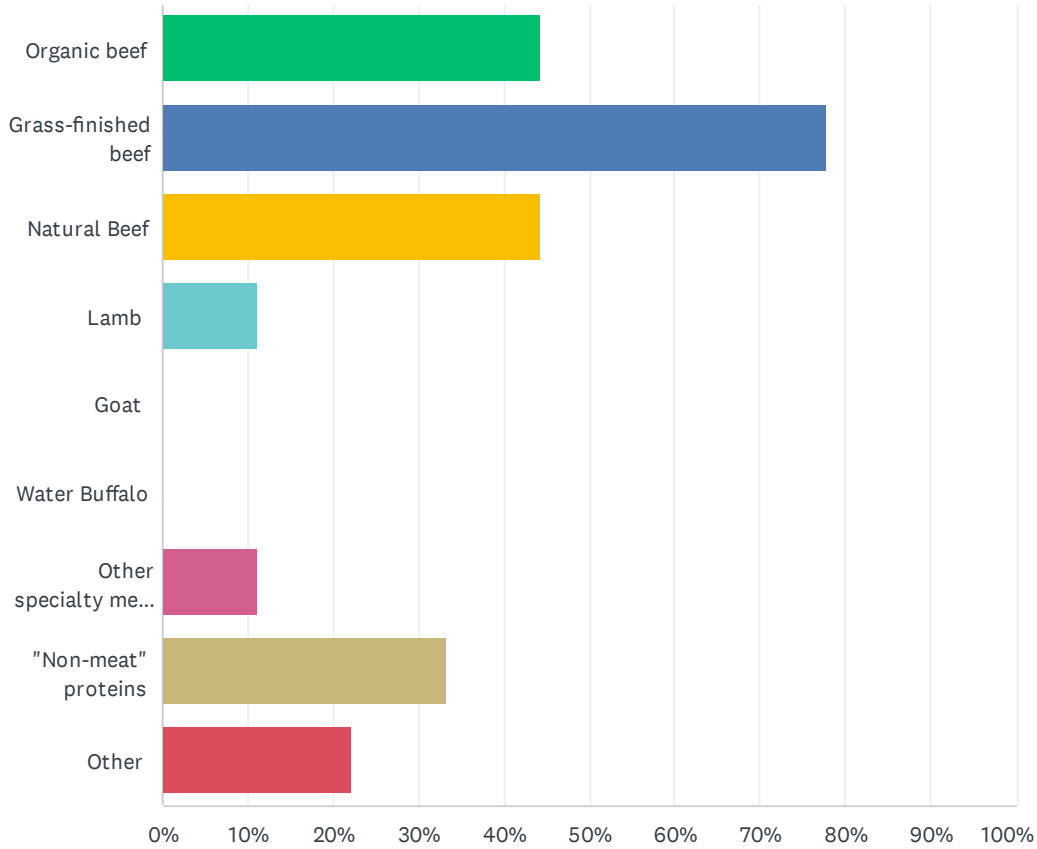
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Our market share is continuing to grow	55.56%	5
No change in market share	44.44%	4
We are seeing our market share decline slightly	0.00%	0
We are seeing a large decline in market share	0.00%	0
<b>TOTAL</b>		<b>9</b>

### Q11 What other protein sectors are emerging as primary competitors for bison? (check all that apply)

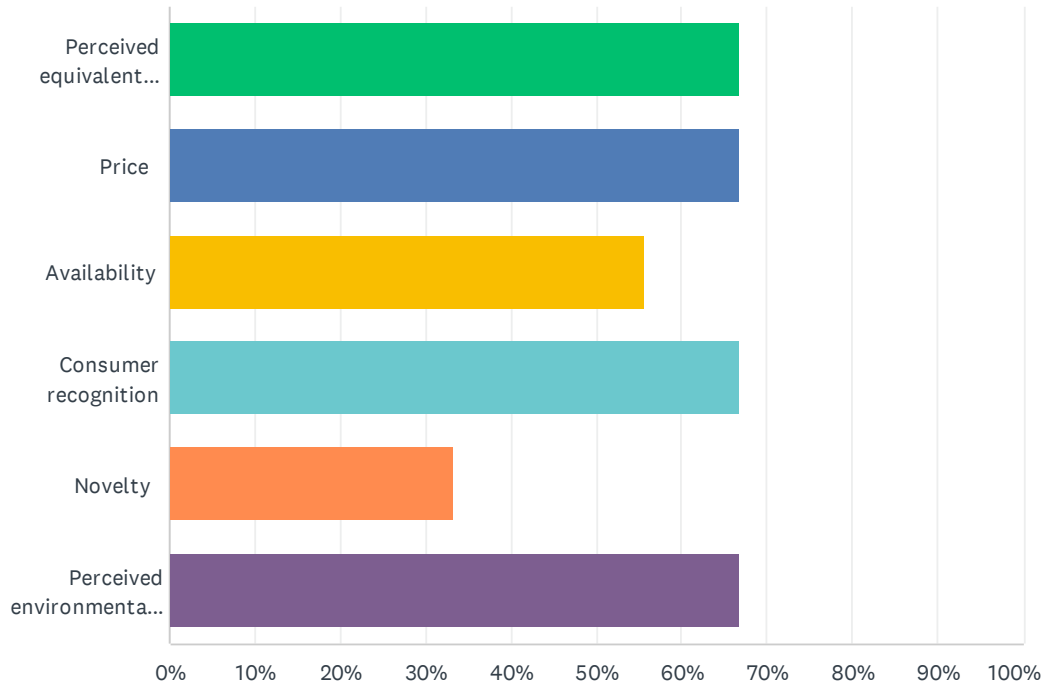
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES
Organic beef	44.44% 4
Grass-finished beef	77.78% 7
Natural Beef	44.44% 4
Lamb	11.11% 1
Goat	0.00% 0
Water Buffalo	0.00% 0
Other specialty meats (Please specify.)	11.11% 1
"Non-meat" proteins	33.33% 3
Other	22.22% 2
Total Respondents: 9	

## Q12 Why are these other proteins competing successfully against bison (check all that apply)?

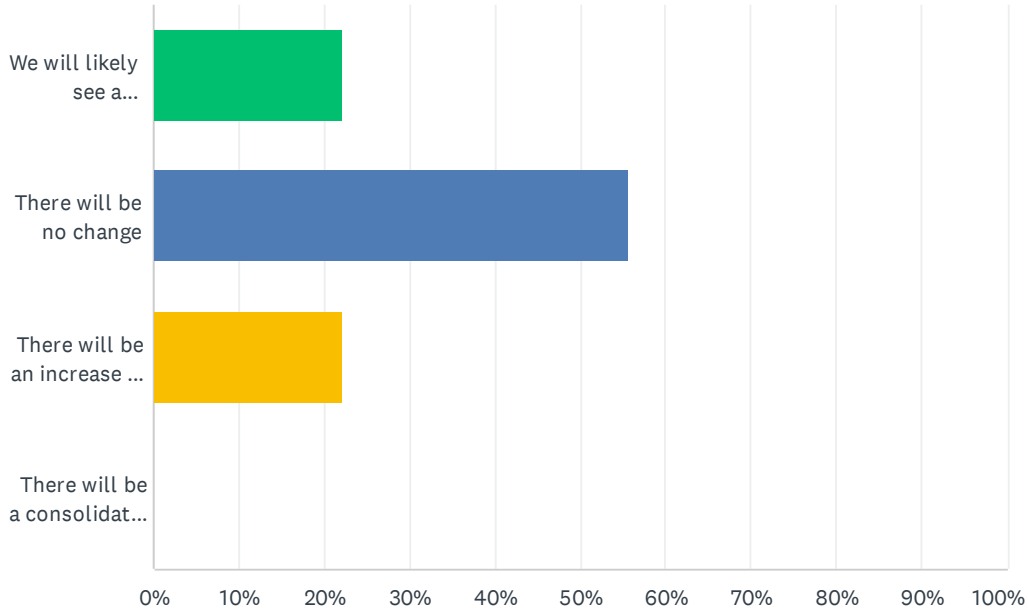
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Perceived equivalent health benefits	66.67%	6
Price	66.67%	6
Availability	55.56%	5
Consumer recognition	66.67%	6
Novelty	33.33%	3
Perceived environmental benefits	66.67%	6
Total Respondents: 9		

### Q13 What is the outlook for the infrastructure of bison marketers North America over the next 18 months?

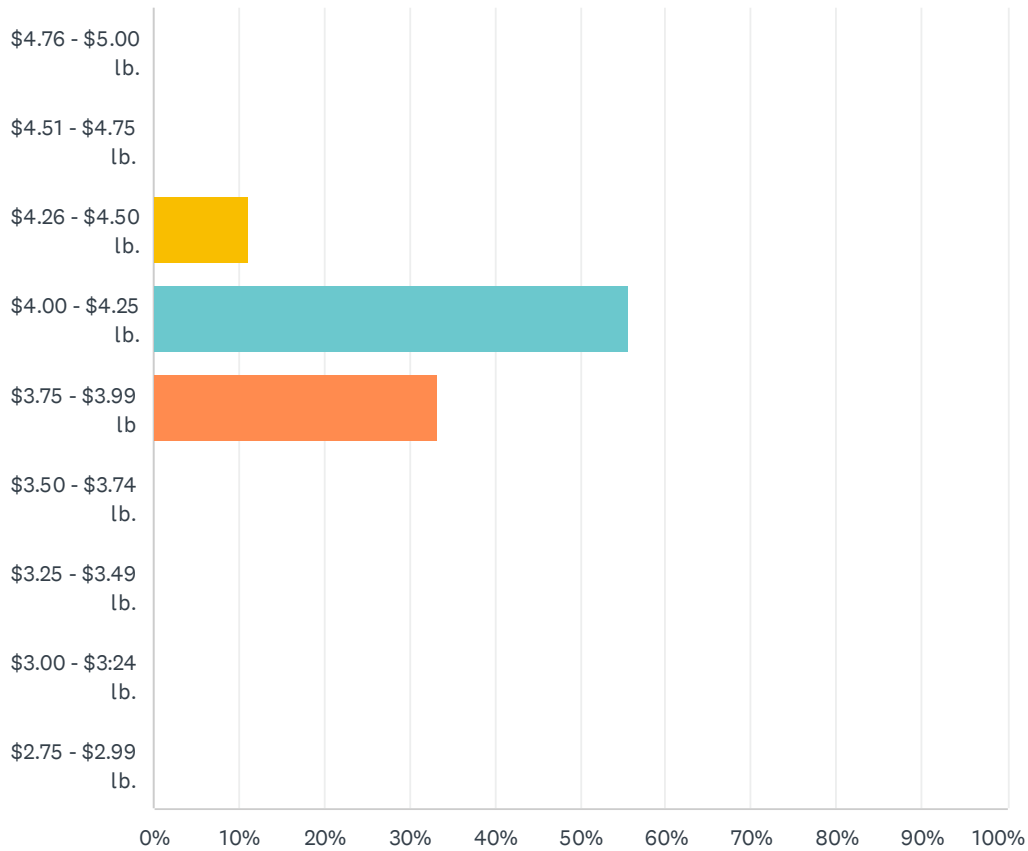
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
We will likely see a consolidation of marketers	22.22%	2
There will be no change	55.56%	5
There will be an increase in the number of marketers	22.22%	2
There will be a consolidation among existing marketers but entry by new marketers	0.00%	0
<b>TOTAL</b>		<b>9</b>

### Q14 At what price range do you believe that bison bull carcass prices will be sustainable for both producers and marketers, while allowing our industry to continue to build consumer demand?

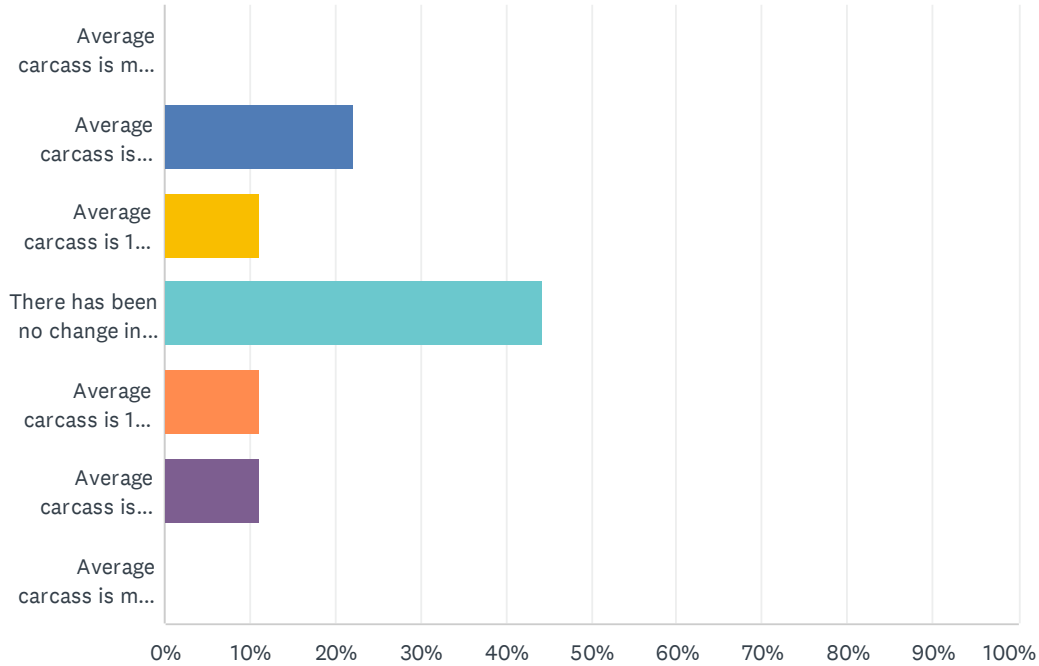
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES
\$4.76 - \$5.00 lb.	0.00% 0
\$4.51 - \$4.75 lb.	0.00% 0
\$4.26 - \$4.50 lb.	11.11% 1
\$4.00 - \$4.25 lb.	55.56% 5
\$3.75 - \$3.99 lb.	33.33% 3
\$3.50 - \$3.74 lb.	0.00% 0
\$3.25 - \$3.49 lb.	0.00% 0
\$3.00 - \$3.24 lb.	0.00% 0
\$2.75 - \$2.99 lb.	0.00% 0
<b>TOTAL</b>	<b>9</b>

## Q15 What difference have you seen in carcass weights over the past 12 months, compared to your historic average?

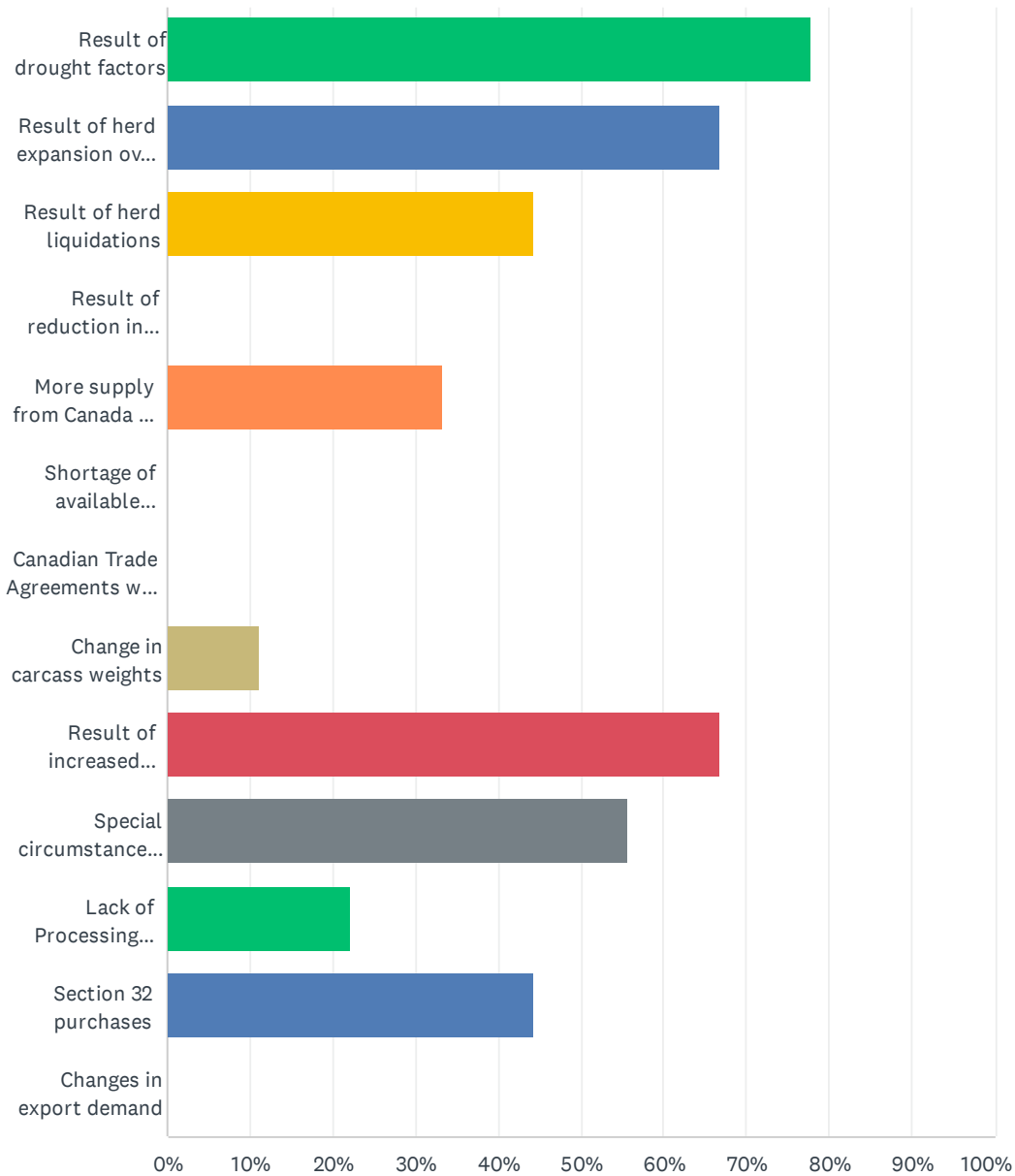
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Average carcass is more than 11% heavier	0.00%	0
Average carcass is 6-10% heavier	22.22%	2
Average carcass is 1-5% heavier	11.11%	1
There has been no change in average weights	44.44%	4
Average carcass is 1-5% lighter	11.11%	1
Average carcass is 6-10% lighter	11.11%	1
Average carcass is more than 10% lighter	0.00%	0
<b>TOTAL</b>		<b>9</b>

Q16 According to the USDA, the 2021 year-to-date slaughter of bison in federally-inspected plants is roughly 5 percent higher than the comparable period in 2020 What do you believe are the key factors behind this trend? (check all that apply)

Answered: 9 Skipped: 1



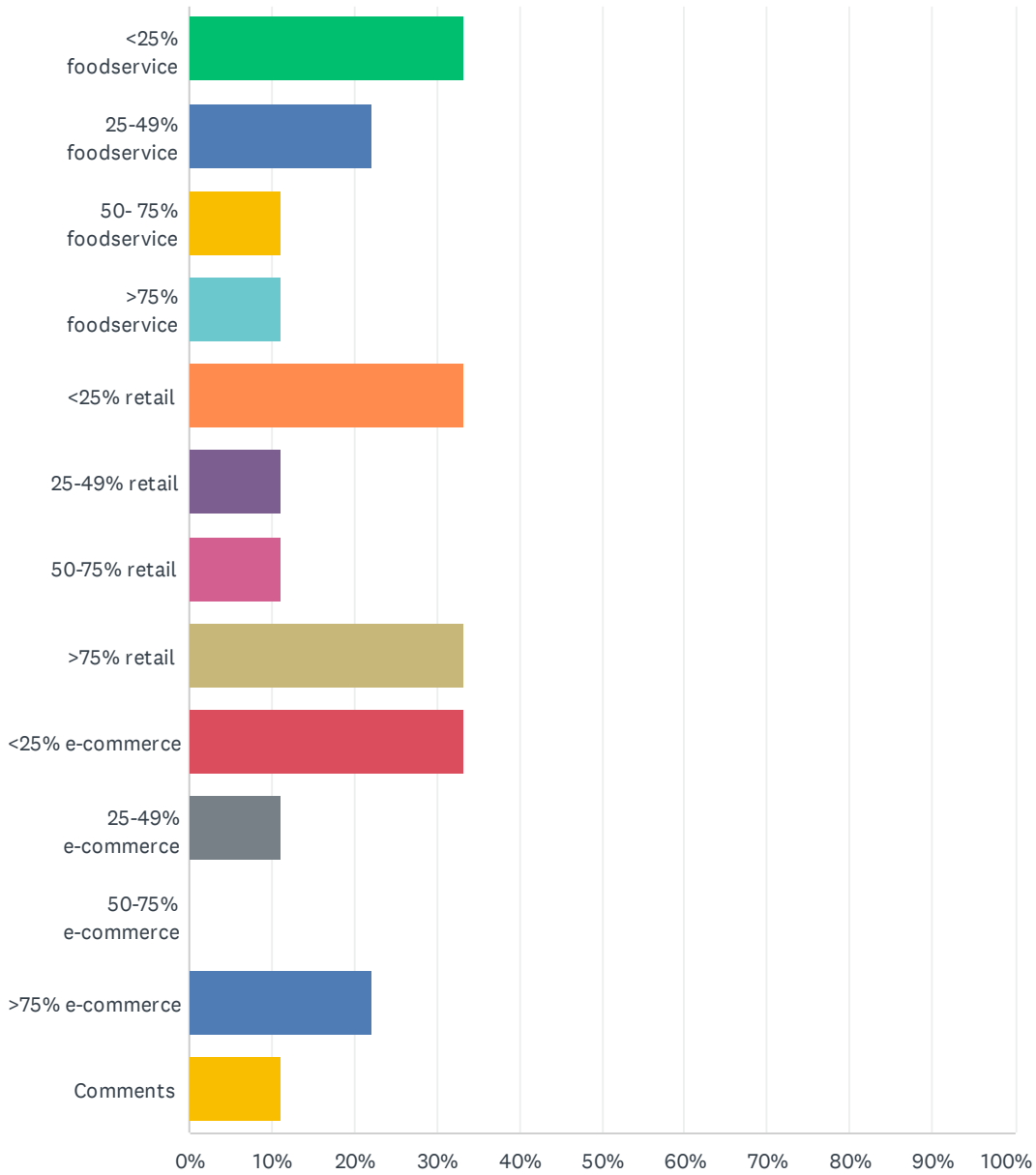


Commercial Marketers Survey, November 2021

ANSWER CHOICES	RESPONSES	
Result of drought factors	77.78%	7
Result of herd expansion over past several years	66.67%	6
Result of herd liquidations	44.44%	4
Result of reduction in demand for bison meat	0.00%	0
More supply from Canada as a result of the exchange rate	33.33%	3
Shortage of available animals	0.00%	0
Canadian Trade Agreements with EU (and other markets)	0.00%	0
Change in carcass weights	11.11%	1
Result of increased demand for bison meat	66.67%	6
Special circumstances due to COVID-19	55.56%	5
Lack of Processing Infrastructure in Canada	22.22%	2
Section 32 purchases	44.44%	4
Changes in export demand	0.00%	0
Total Respondents: 9		

### Q17 What percentage of your product is currently sold through retail, foodservice and e-commerce?

Answered: 9 Skipped: 1

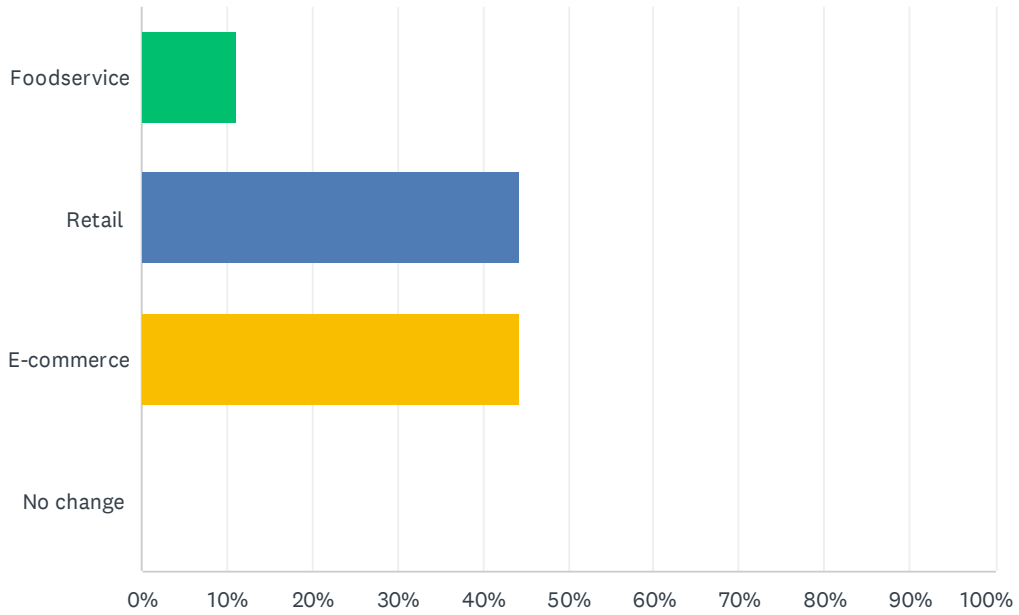


Commercial Marketers Survey, November 2021

ANSWER CHOICES	RESPONSES	
<25% foodservice	33.33%	3
25-49% foodservice	22.22%	2
50- 75% foodservice	11.11%	1
>75% foodservice	11.11%	1
<25% retail	33.33%	3
25-49% retail	11.11%	1
50-75% retail	11.11%	1
>75% retail	33.33%	3
<25% e-commerce	33.33%	3
25-49% e-commerce	11.11%	1
50-75% e-commerce	0.00%	0
>75% e-commerce	22.22%	2
Comments	11.11%	1
Total Respondents: 9		

## Q18 Which channel has shown the largest growth over the past three years?

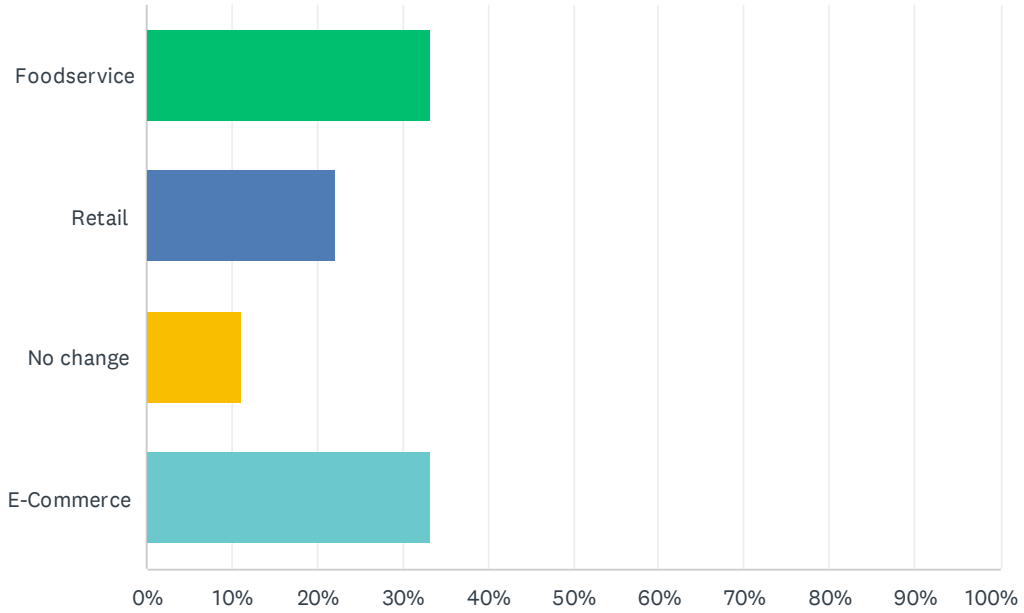
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Foodservice	11.11%	1
Retail	44.44%	4
E-commerce	44.44%	4
No change	0.00%	0
<b>TOTAL</b>		<b>9</b>

## Q19 Which channel do you anticipate to show the largest growth over the next three years?

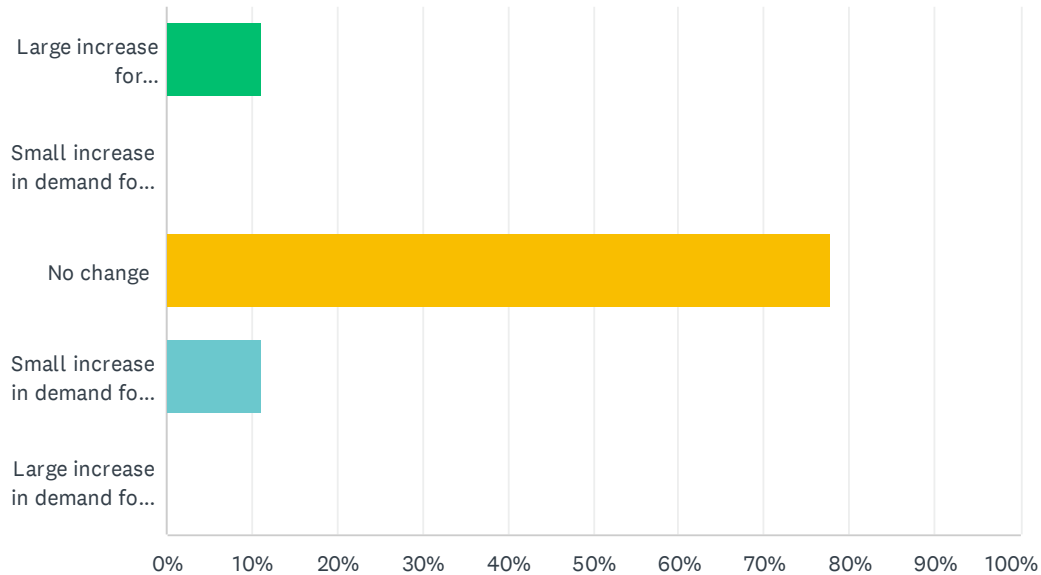
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES
Foodservice	33.33% 3
Retail	22.22% 2
No change	11.11% 1
E-Commerce	33.33% 3
<b>TOTAL</b>	<b>9</b>

## Q20 Is there a shift in demand for the type of finishing of production in comparison to the past five years?

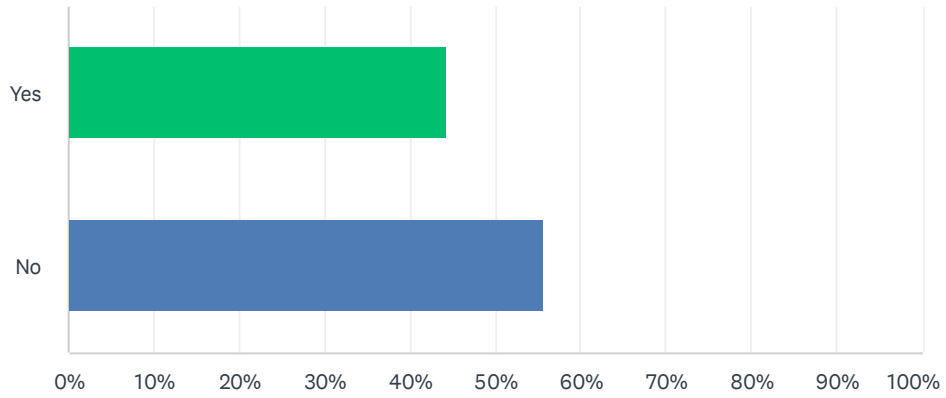
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Large increase for grain-finished product compared to grass-finished	11.11%	1
Small increase in demand for grain finished product compared to grass-finished	0.00%	0
No change	77.78%	7
Small increase in demand for grass-finished product compared to grain-finished product	11.11%	1
Large increase in demand for grass-finished product, compared to grain-finished product	0.00%	0
<b>TOTAL</b>		<b>9</b>

## Q21 U.S. MARKETERS ONLY: Have you exported bison meat to the European Union in 2021?

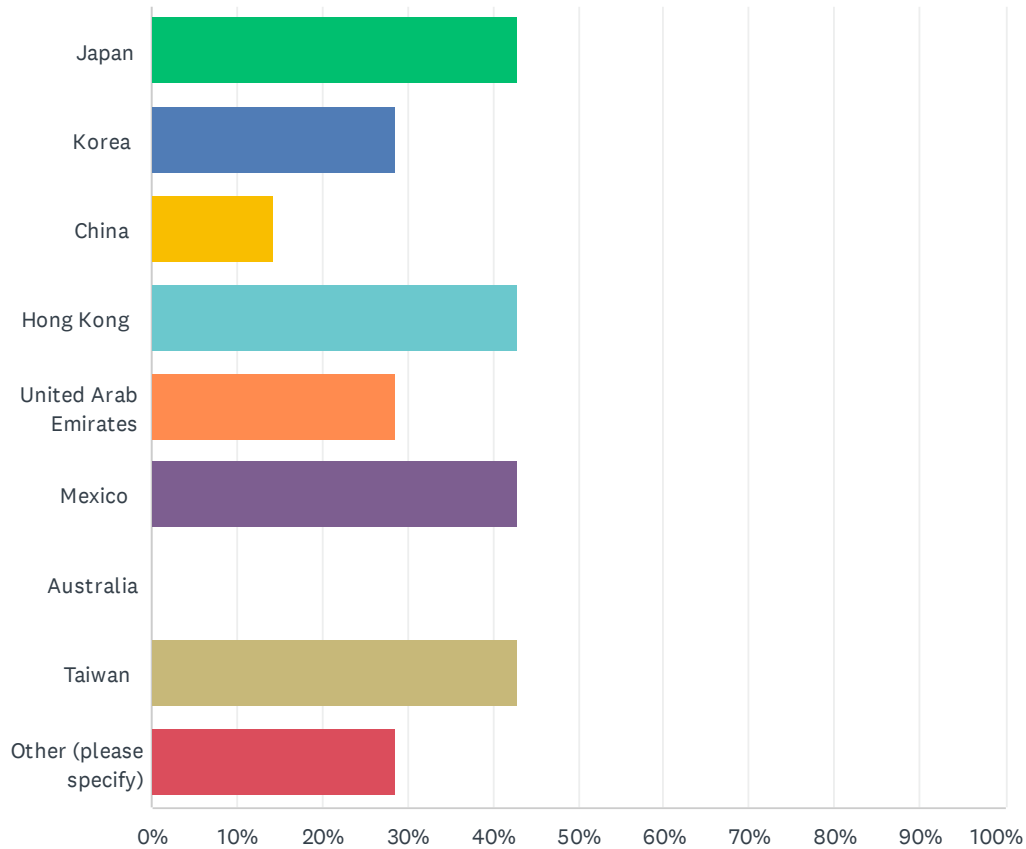
Answered: 9 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	44.44%	4
No	55.56%	5
TOTAL		9

## Q22 U.S. MARKETERS ONLY: What other export markets could be useful for your business?

Answered: 7 Skipped: 3

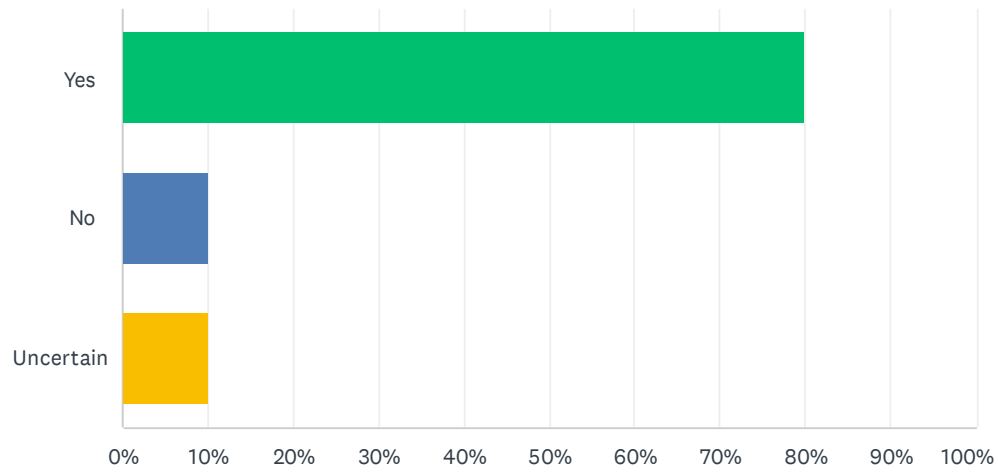


ANSWER CHOICES	RESPONSES
Japan	42.86% 3
Korea	28.57% 2
China	14.29% 1
Hong Kong	42.86% 3
United Arab Emirates	28.57% 2
Mexico	42.86% 3
Australia	0.00% 0
Taiwan	42.86% 3
Other (please specify)	28.57% 2
Total Respondents: 7	



## Q23 Are you planning to expand your business in the next 12 months?

Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	80.00%	8
No	10.00%	1
Uncertain	10.00%	1
<b>TOTAL</b>		<b>10</b>

**Q24 Let us know any changes that you are making in your business as a result of the current supply/price situation**

Answered: 3 Skipped: 7

**Q25 Please let us know any other thoughts about the future of the commercial bison marketing business you'd like to share.**

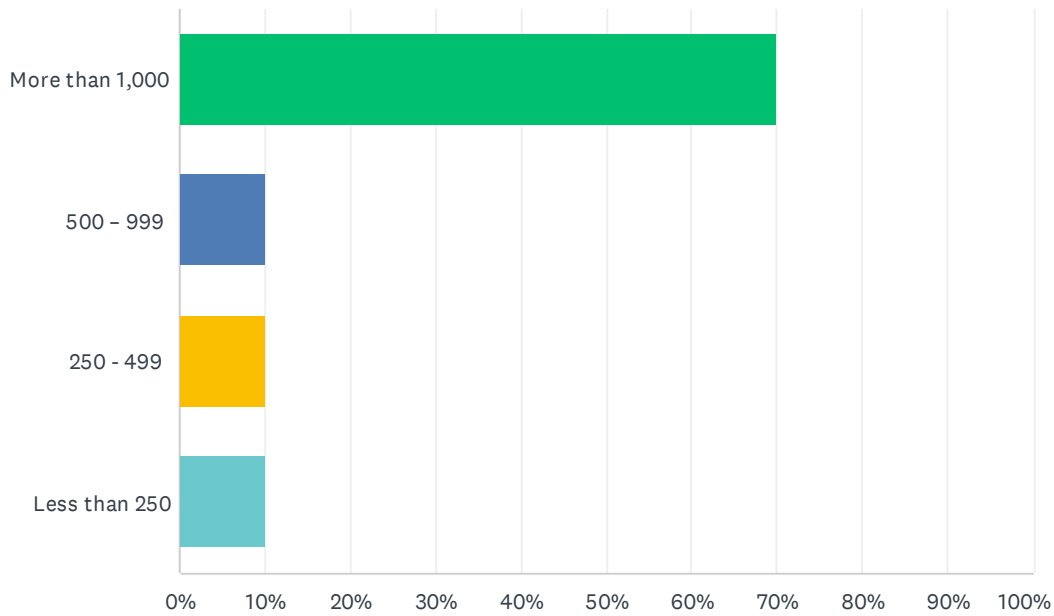
Answered: 2 Skipped: 8

## Q26 Where do you believe the NBA should be focusing its marketing efforts?

Answered: 5 Skipped: 5

## Q27 How many bison did you process in the most recent calendar year?

Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES
More than 1,000	70.00% 7
500 - 999	10.00% 1
250 - 499	10.00% 1
Less than 250	10.00% 1
<b>TOTAL</b>	<b>10</b>