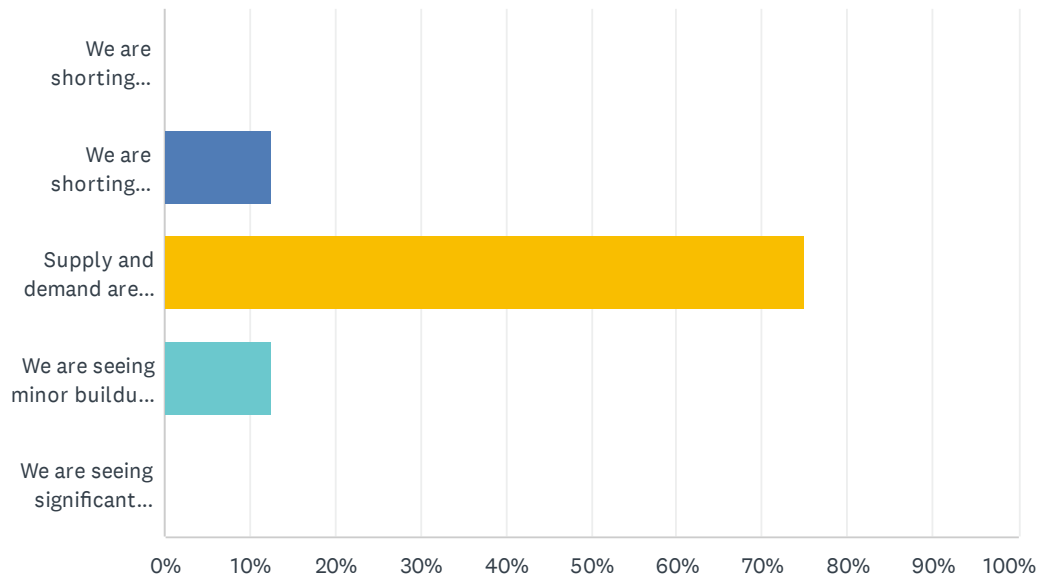


# Q1 How well are you able to satisfy your customers' orders?

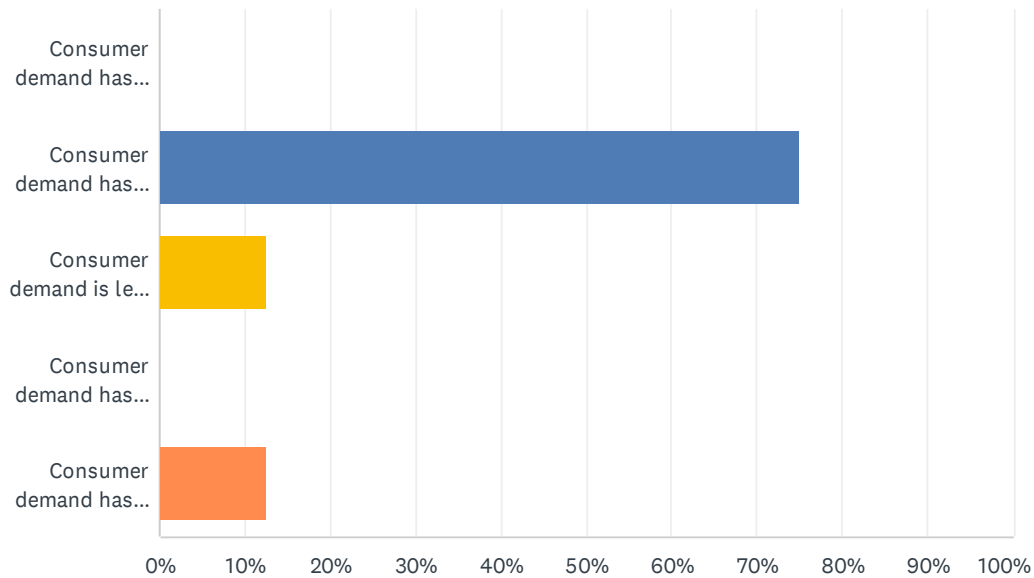
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
We are shorting customers in excess of 20%	0.00%	0
We are shorting customers 0-19%	12.50%	1
Supply and demand are roughly in balance	75.00%	6
We are seeing minor buildup of inventory	12.50%	1
We are seeing significant build-up of inventory	0.00%	0
<b>TOTAL</b>		<b>8</b>

## Q2 How has consumer demand changed for bison since May 2020?

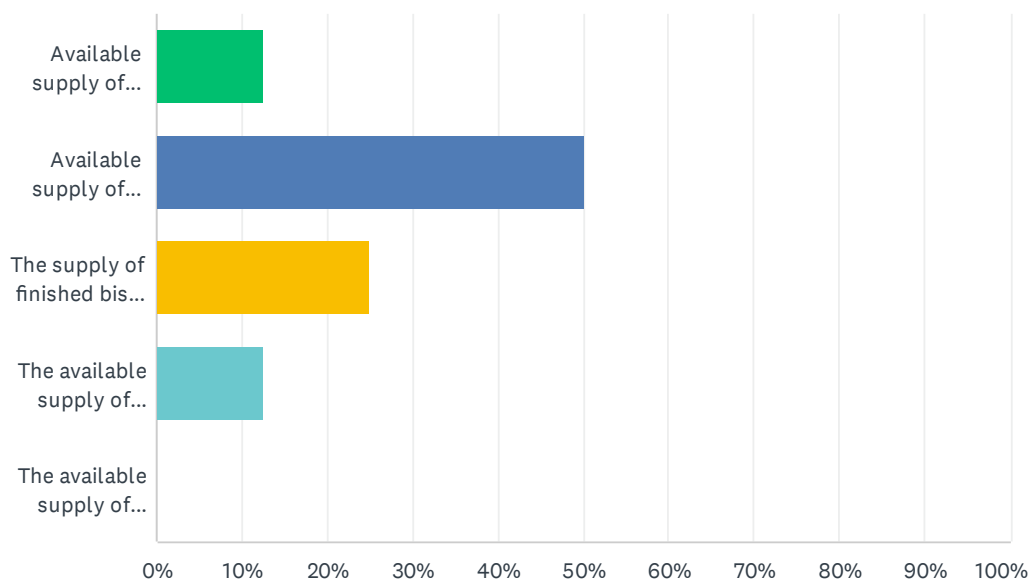
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Consumer demand has increased more than 10%	0.00%	0
Consumer demand has increased 1-9%	75.00%	6
Consumer demand is level with May 2020	12.50%	1
Consumer demand has declined 1-9%	0.00%	0
Consumer demand has declined more than 10%	12.50%	1
<b>TOTAL</b>		<b>8</b>

### Q3 How has the supply of finished bison changed since May 2020?

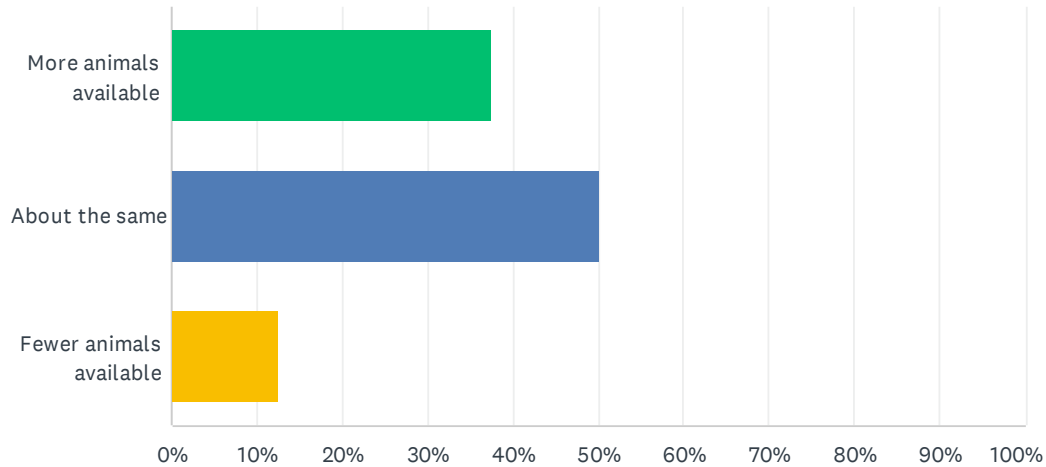
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Available supply of finished bison has increased more than 10%	12.50%	1
Available supply of finished bison has increased 1-9%	50.00%	4
The supply of finished bison is roughly equal to May 2020?	25.00%	2
The available supply of finished bison has decreased 1-9%	12.50%	1
The available supply of finished bison has decreased more than 10%	0.00%	0
<b>TOTAL</b>		<b>8</b>

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

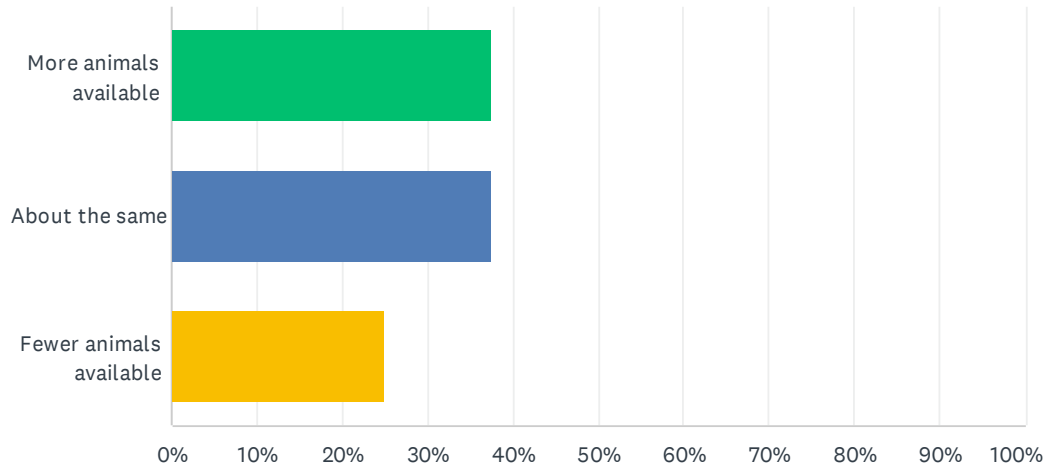
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES
More animals available	37.50% 3
About the same	50.00% 4
Fewer animals available	12.50% 1
TOTAL	8

## Q5 What do you see in regard to the available supply of finished bison in the next 4 - 6 months?

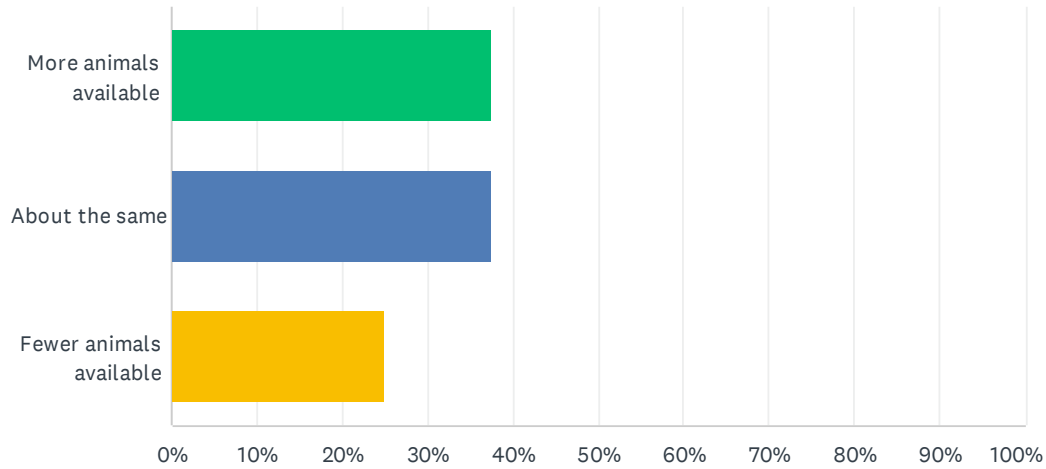
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
More animals available	37.50%	3
About the same	37.50%	3
Fewer animals available	25.00%	2
<b>TOTAL</b>		<b>8</b>

## Q6 What do you see in regard to the available supply of finished bison in the next 7 - 12 months?

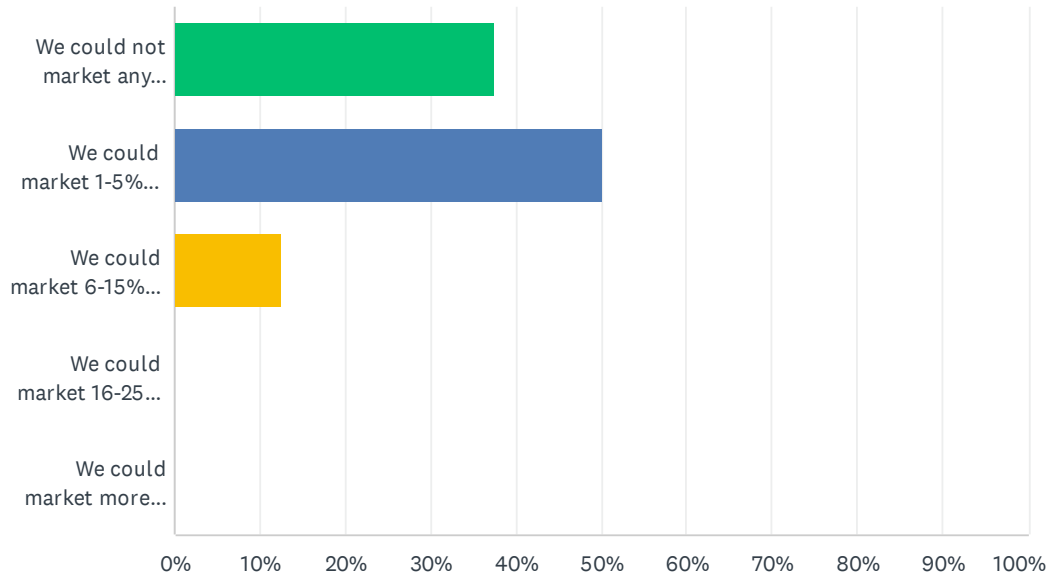
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
More animals available	37.50%	3
About the same	37.50%	3
Fewer animals available	25.00%	2
<b>TOTAL</b>		<b>8</b>

## Q7 What percentage of additional product could you market to existing customers at today's prices?

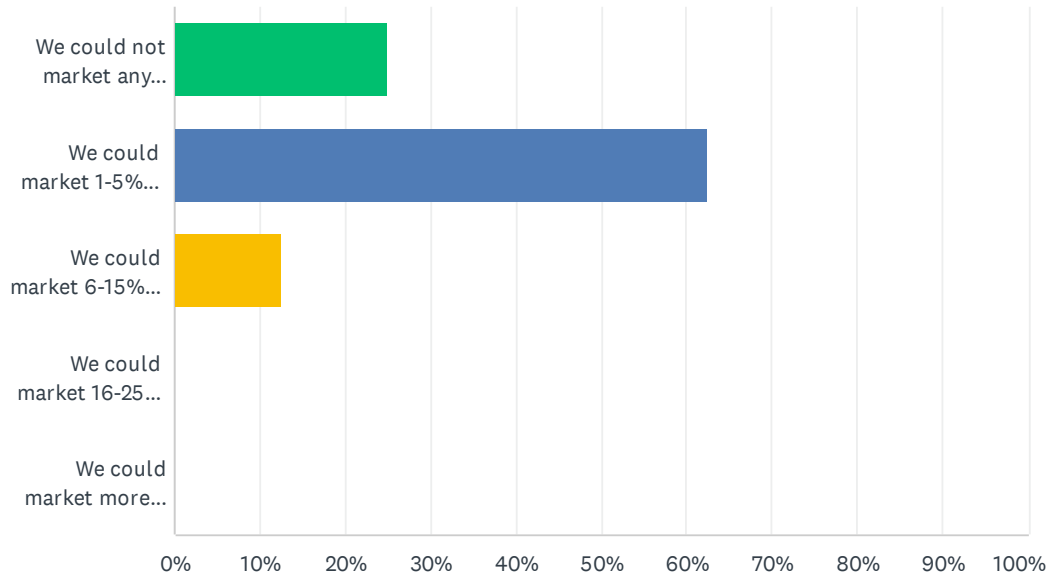
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
We could not market any additional product	37.50%	3
We could market 1-5% more product	50.00%	4
We could market 6-15% more product	12.50%	1
We could market 16-25% more product	0.00%	0
We could market more than 25% more product	0.00%	0
<b>TOTAL</b>		<b>8</b>

## Q8 What percentage of additional product could you market to new customers at today's prices?

Answered: 8 Skipped: 0

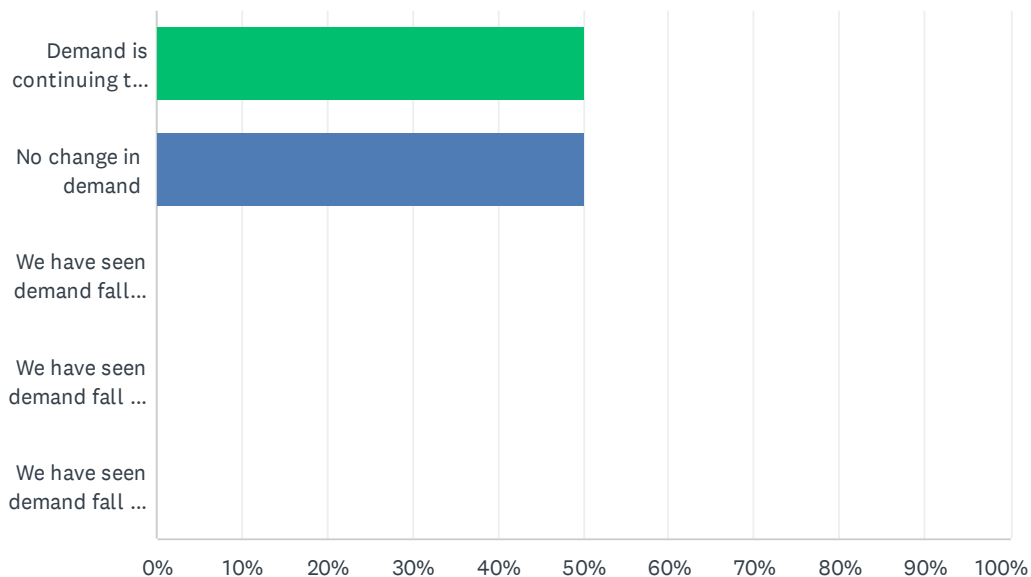


ANSWER CHOICES	RESPONSES	
We could not market any additional product	25.00%	2
We could market 1-5% more product	62.50%	5
We could market 6-15% more product	12.50%	1
We could market 16-25% more product	0.00%	0
We could market more than 25% more product	0.00%	0
<b>TOTAL</b>		<b>8</b>



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

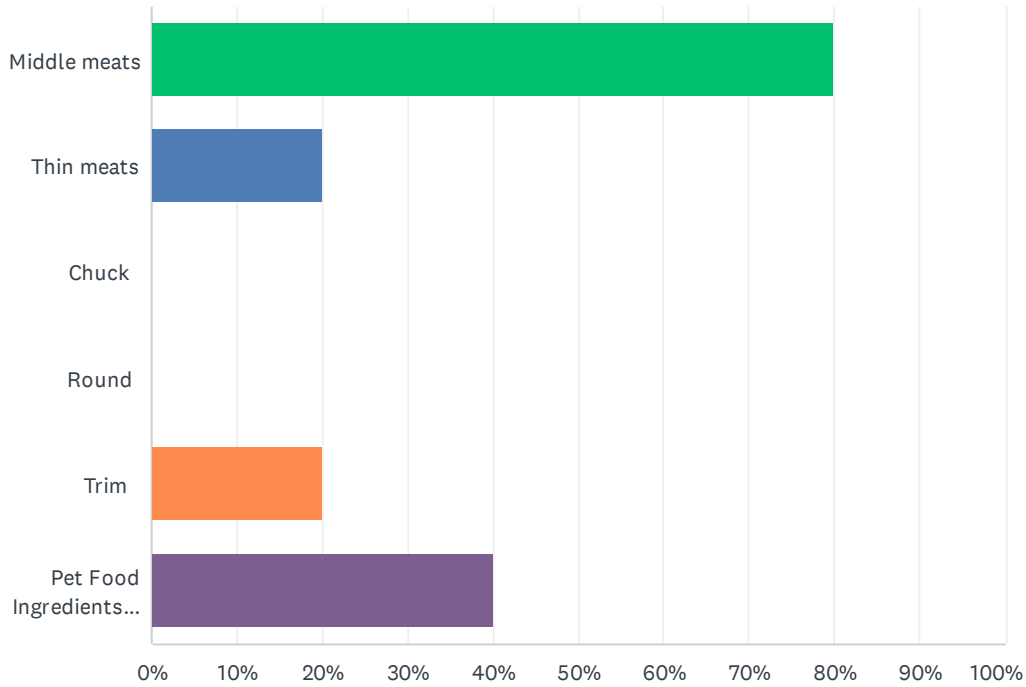
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Demand is continuing to increase	50.00%	4
No change in demand	50.00%	4
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>8</b>

### Q10 For which meats has demand exceeded supply over the past year? (check all that apply)

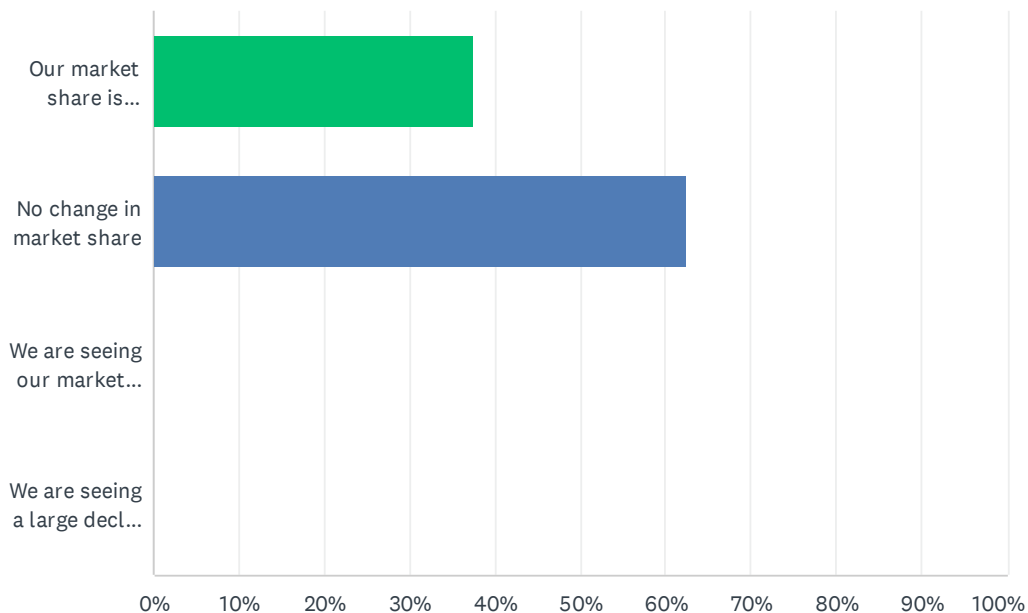
Answered: 5 Skipped: 3



ANSWER CHOICES	RESPONSES	
Middle meats	80.00%	4
Thin meats	20.00%	1
Chuck	0.00%	0
Round	0.00%	0
Trim	20.00%	1
Pet Food Ingredients (heart, liver, etc.)	40.00%	2
Total Respondents: 5		

### Q11 What impact is the current supply/price situation having on the market share for bison vs. other red meats?

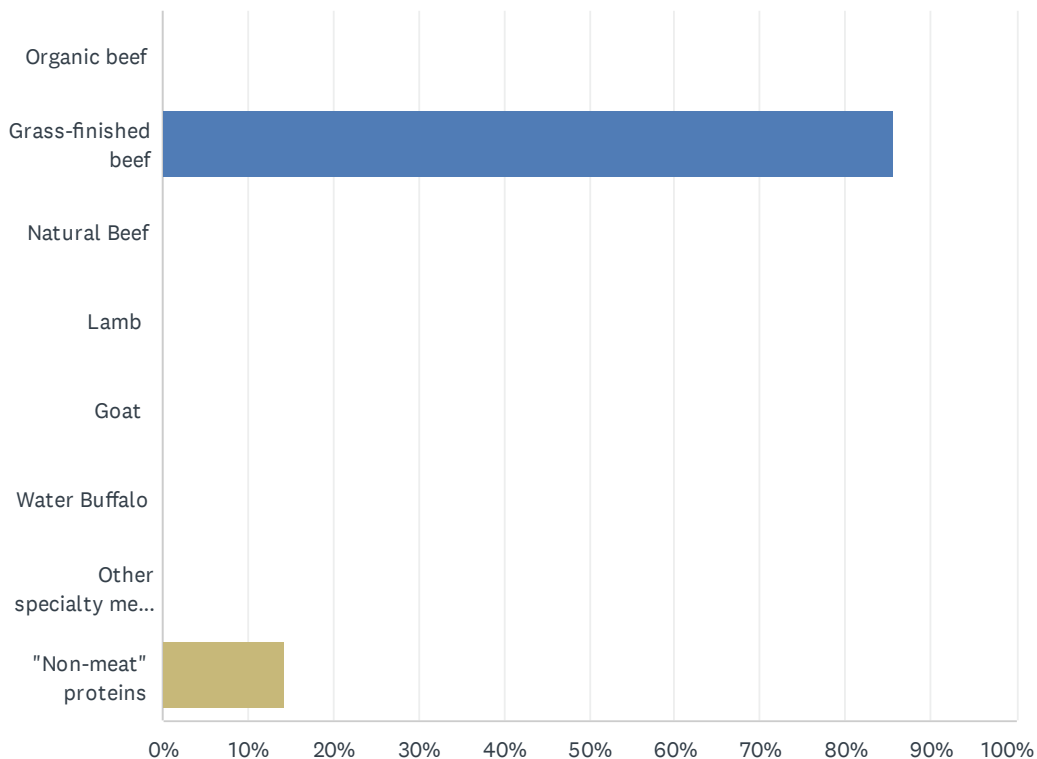
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Our market share is continuing to grow	37.50%	3
No change in market share	62.50%	5
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>8</b>

## Q12 What other protein sectors are emerging as primary competitors for bison? (check all that apply)

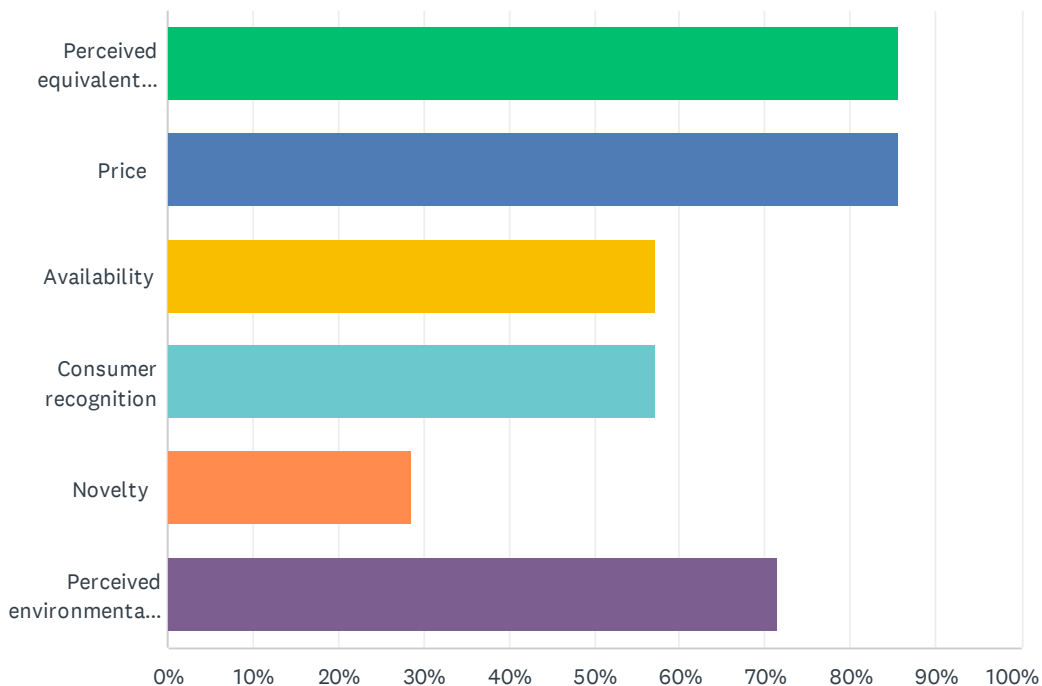
Answered: 7 Skipped: 1



ANSWER CHOICES	RESPONSES	
Organic beef	0.00%	0
Grass-finished beef	85.71%	6
Natural Beef	0.00%	0
Lamb	0.00%	0
Goat	0.00%	0
Water Buffalo	0.00%	0
Other specialty meats (Please specify.)	0.00%	0
"Non-meat" proteins	14.29%	1
<b>TOTAL</b>		<b>7</b>

### Q13 Why are these other proteins competing successfully against bison (check all that apply)?

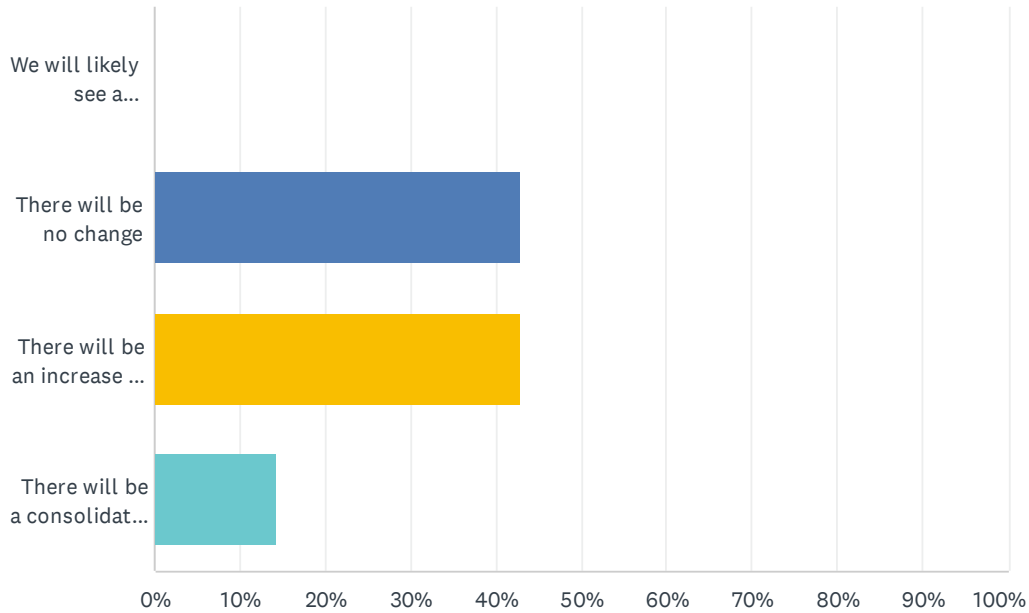
Answered: 7 Skipped: 1



ANSWER CHOICES	RESPONSES	
Perceived equivalent health benefits	85.71%	6
Price	85.71%	6
Availability	57.14%	4
Consumer recognition	57.14%	4
Novelty	28.57%	2
Perceived environmental benefits	71.43%	5
Total Respondents: 7		

## Q14 What is the outlook for the infrastructure of bison marketers North America over the next 18 months?

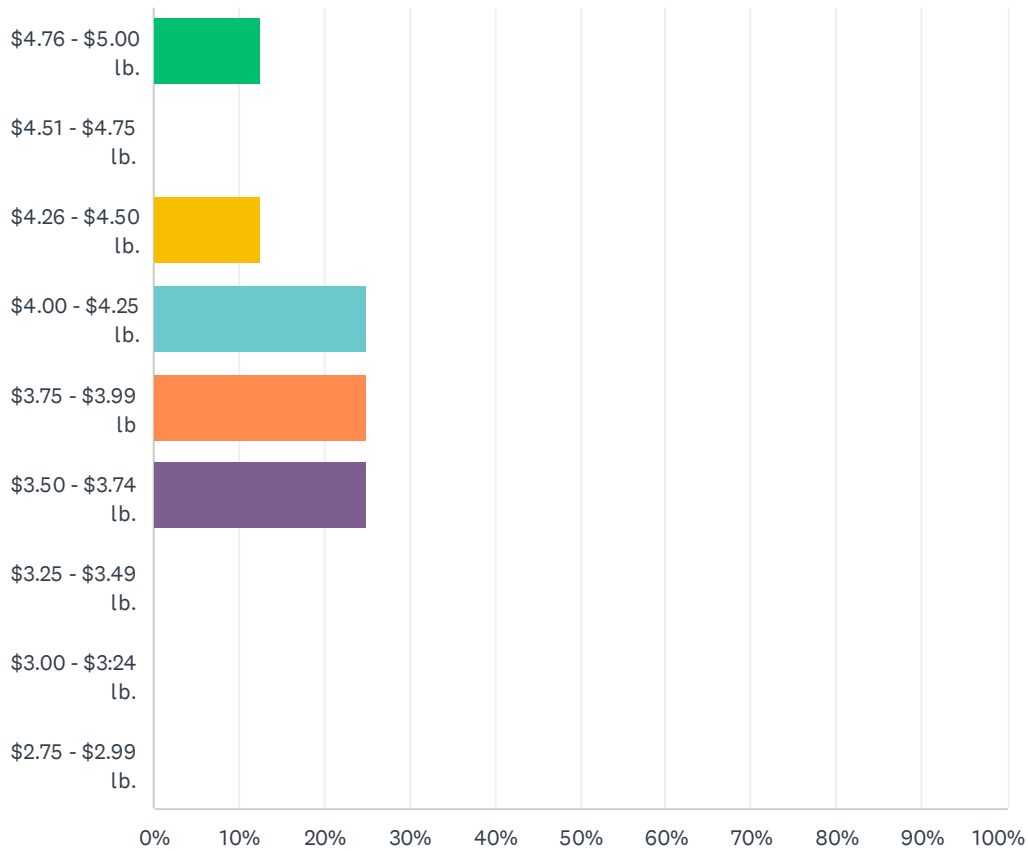
Answered: 7 Skipped: 1



ANSWER CHOICES	RESPONSES	
We will likely see a consolidation of marketers	0.00%	0
There will be no change	42.86%	3
There will be an increase in the number of marketers	42.86%	3
There will be a consolidation among existing marketers but entry by new marketers	14.29%	1
<b>TOTAL</b>		<b>7</b>

### Q15 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?

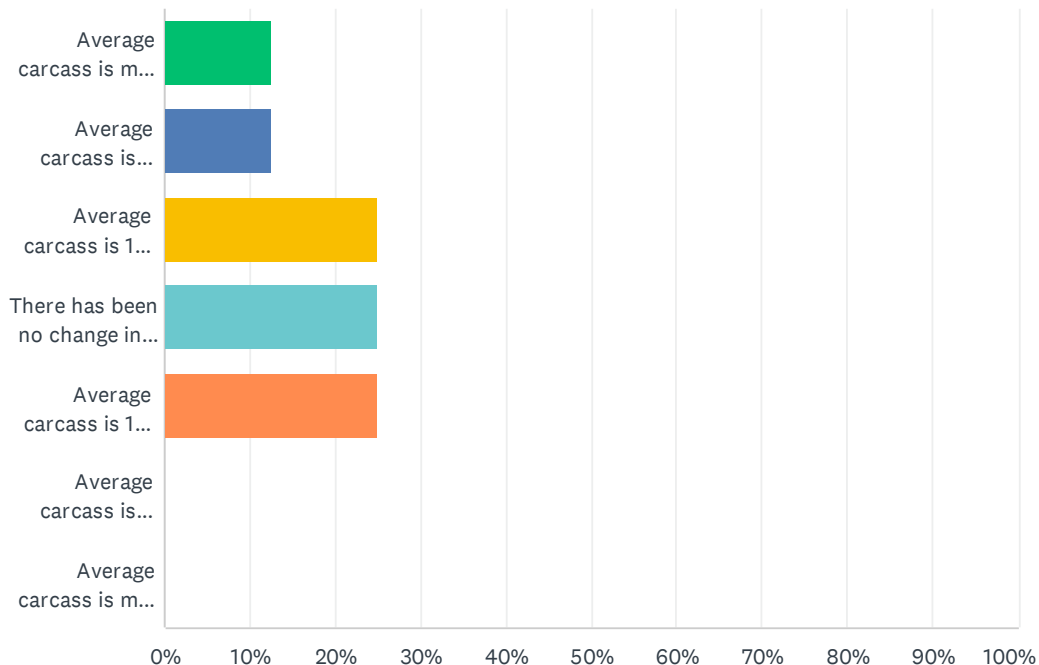
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
\$4.76 - \$5.00 lb.	12.50%	1
\$4.51 - \$4.75 lb.	0.00%	0
\$4.26 - \$4.50 lb.	12.50%	1
\$4.00 - \$4.25 lb.	25.00%	2
\$3.75 - \$3.99 lb.	25.00%	2
\$3.50 - \$3.74 lb.	25.00%	2
\$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>8</b>

## Q16 What difference have you seen in carcass weights over the past 12 months, compared to your historic average?

Answered: 8 Skipped: 0

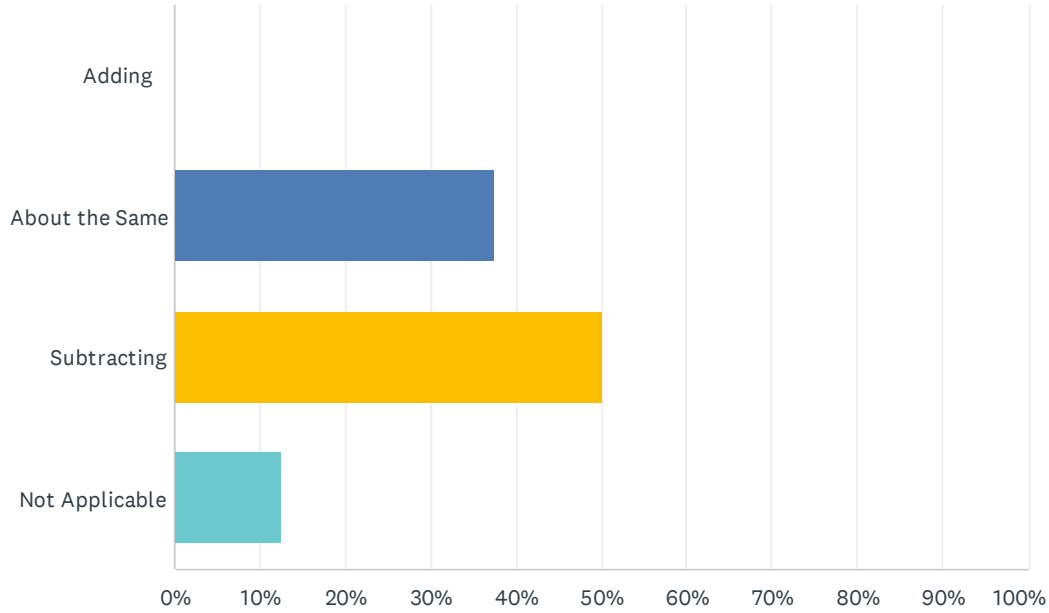


ANSWER CHOICES	RESPONSES	
Average carcass is more than 11% heavier	12.50%	1
Average carcass is 6-10% heavier	12.50%	1
Average carcass is 1-5% heavier	25.00%	2
There has been no change in average weights	25.00%	2
Average carcass is 1-5 % lighter	25.00%	2
Average carcass is 6-10% lighter	0.00%	0
Average carcass is more than 10% lighter	0.00%	0
<b>TOTAL</b>		<b>8</b>



## Q17 Compared to this point last year, are you adding or subtracting trim inventory in cold storage?

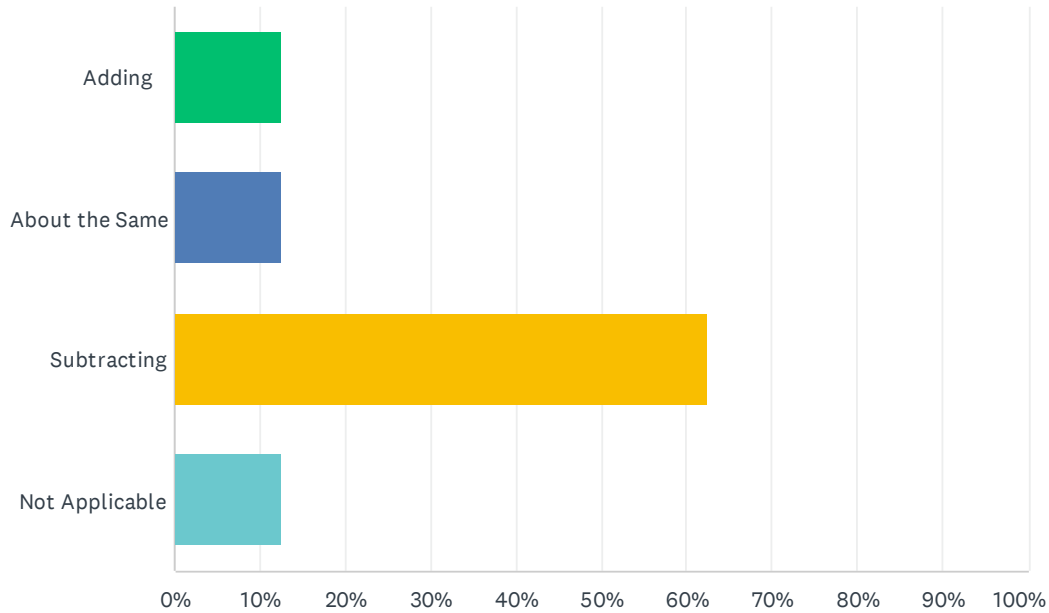
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Adding	0.00%	0
About the Same	37.50%	3
Subtracting	50.00%	4
Not Applicable	12.50%	1
<b>TOTAL</b>		<b>8</b>

### Q18 Are you adding or subtracting middle meats (loins, ribeye, etc) inventory in cold storage compared to this point in time last year?

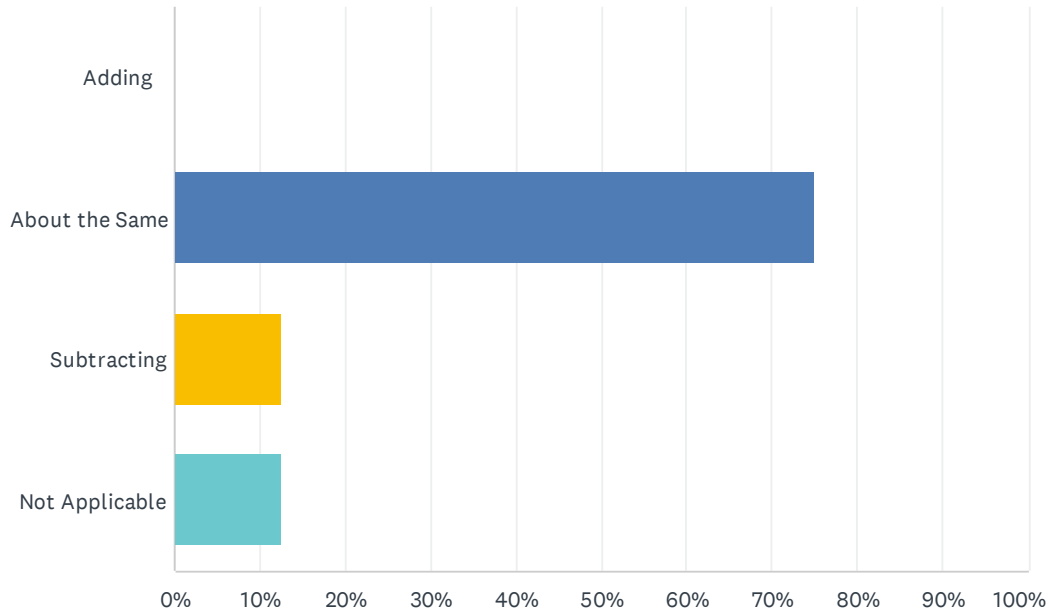
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Adding	12.50%	1
About the Same	12.50%	1
Subtracting	62.50%	5
Not Applicable	12.50%	1
<b>TOTAL</b>		<b>8</b>

## Q19 Compared to this point last year, are you adding or subtracting end meats (chucks, rounds, etc.) to inventory in cold storage?

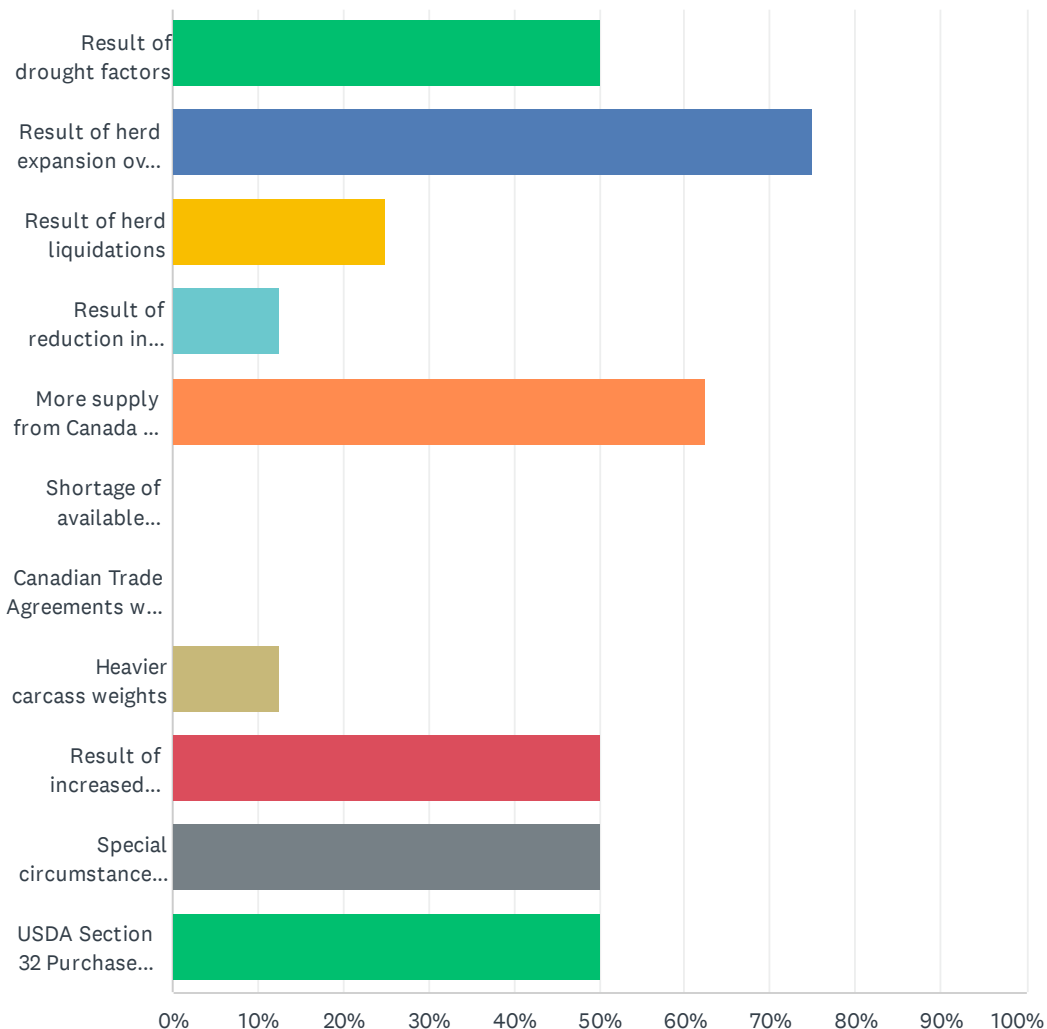
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Adding	0.00%	0
About the Same	75.00%	6
Subtracting	12.50%	1
Not Applicable	12.50%	1
<b>TOTAL</b>		<b>8</b>

Q20 According to the USDA, the 2021 year-to-date slaughter of bison in federally-inspected plants is roughly 6.5 percent higher than the comparable period in 2020 What do you believe are the key factors behind this trend? (check all that apply)

Answered: 8 Skipped: 0

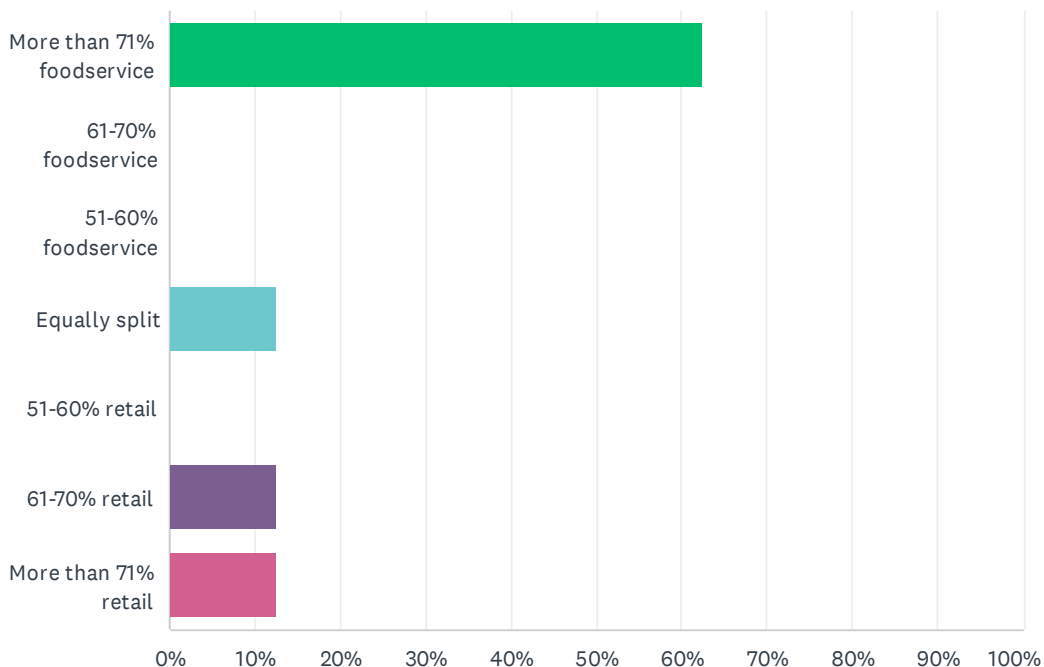


Commercial Marketers Survey, May 2021

ANSWER CHOICES	RESPONSES	
Result of drought factors	50.00%	4
Result of herd expansion over past several years	75.00%	6
Result of herd liquidations	25.00%	2
Result of reduction in demand for bison meat	12.50%	1
More supply from Canada as a result of the exchange rate	62.50%	5
Shortage of available animals	0.00%	0
Canadian Trade Agreements with EU (and other markets)	0.00%	0
Heavier carcass weights	12.50%	1
Result of increased demand for bison meat	50.00%	4
Special circumstances due to COVID-19	50.00%	4
USDA Section 32 Purchase Program	50.00%	4
Total Respondents: 8		

## Q21 What percentage of your product is currently going to retail vs. foodservice?

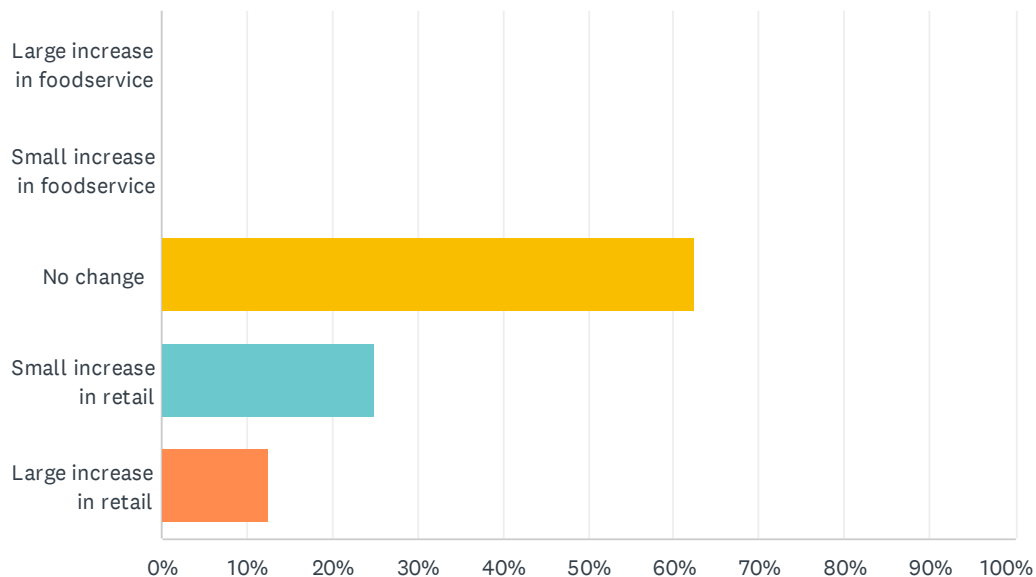
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
More than 71% foodservice	62.50%	5
61-70% foodservice	0.00%	0
51-60% foodservice	0.00%	0
Equally split	12.50%	1
51-60% retail	0.00%	0
61-70% retail	12.50%	1
More than 71% retail	12.50%	1
<b>TOTAL</b>		<b>8</b>

## Q22 How has the ratio of foodservice and retail customers changed in the past three years?

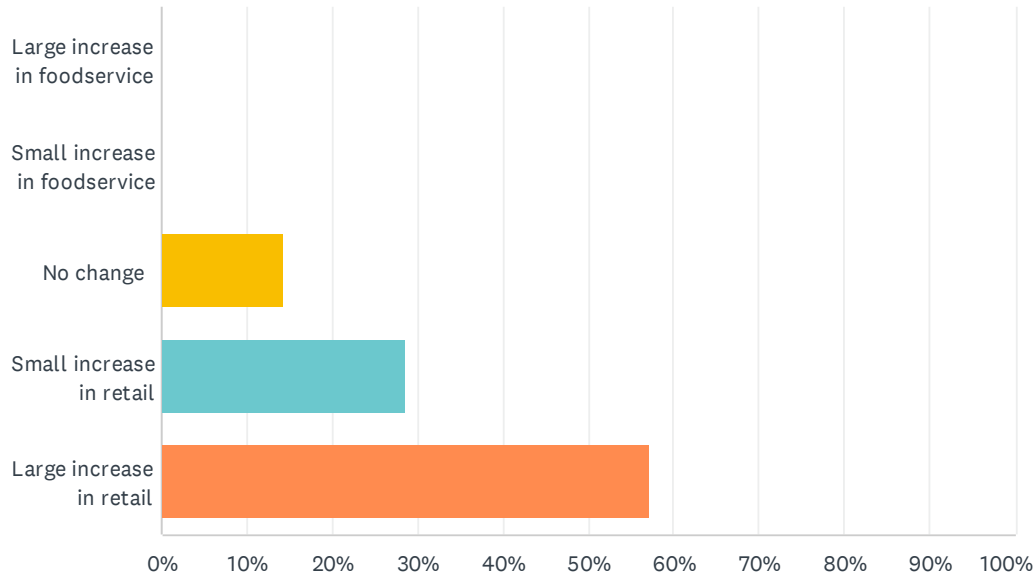
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Large increase in foodservice	0.00%	0
Small increase in foodservice	0.00%	0
No change	62.50%	5
Small increase in retail	25.00%	2
Large increase in retail	12.50%	1
<b>TOTAL</b>		<b>8</b>

## Q23 How did COVID 19 impact the ratio of foodservice vs. retail since March 2020?

Answered: 7 Skipped: 1

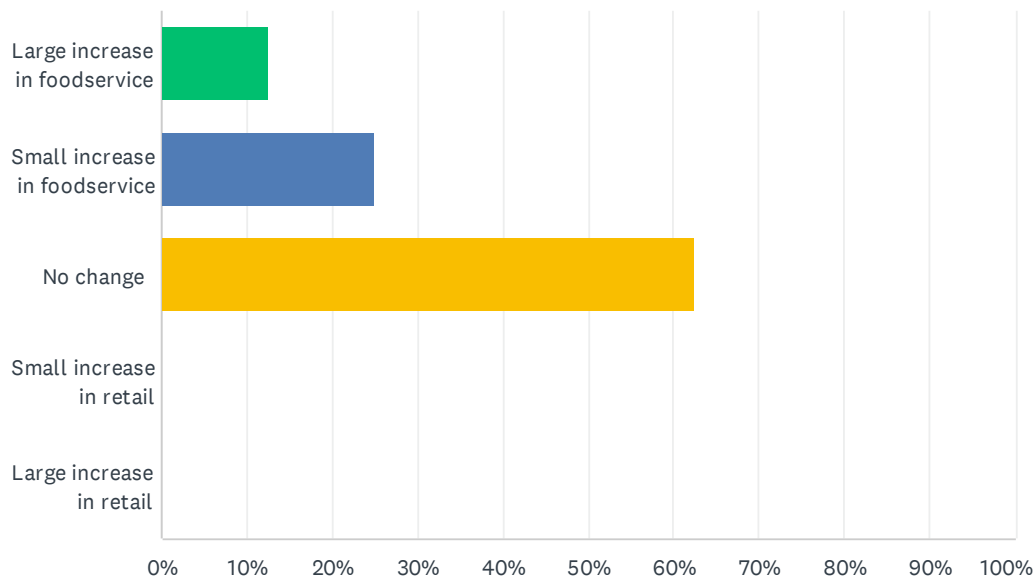


ANSWER CHOICES	RESPONSES	
Large increase in foodservice	0.00%	0
Small increase in foodservice	0.00%	0
No change	14.29%	1
Small increase in retail	28.57%	2
Large increase in retail	57.14%	4
<b>TOTAL</b>		<b>7</b>



## Q24 How do you expect the ratio of foodservice and retail customers to change in the next three years?

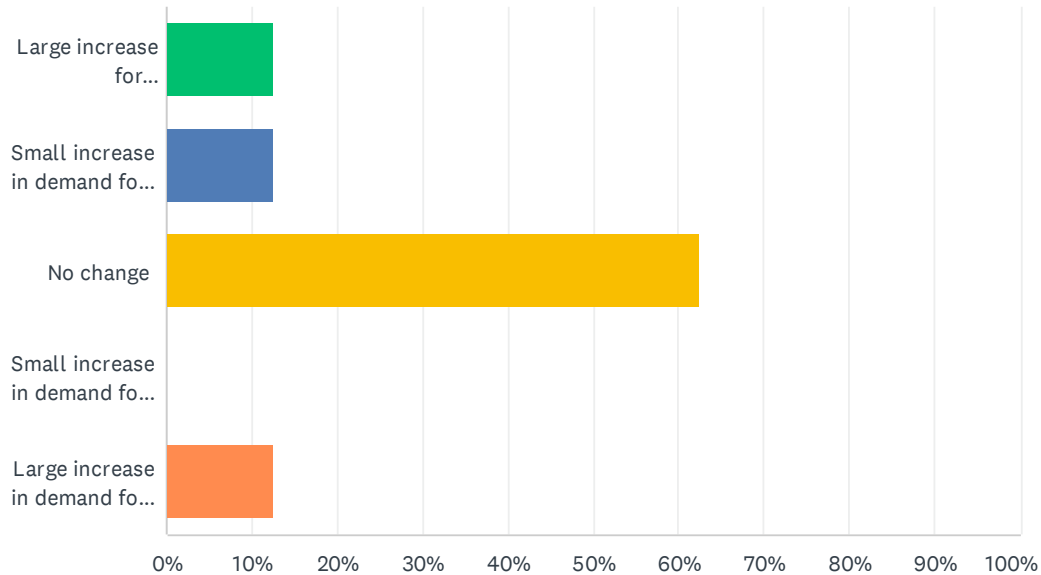
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Large increase in foodservice	12.50%	1
Small increase in foodservice	25.00%	2
No change	62.50%	5
Small increase in retail	0.00%	0
Large increase in retail	0.00%	0
<b>TOTAL</b>		<b>8</b>

## Q25 Is there a shift in demand for the type of finishing of production in comparison to the past five years?

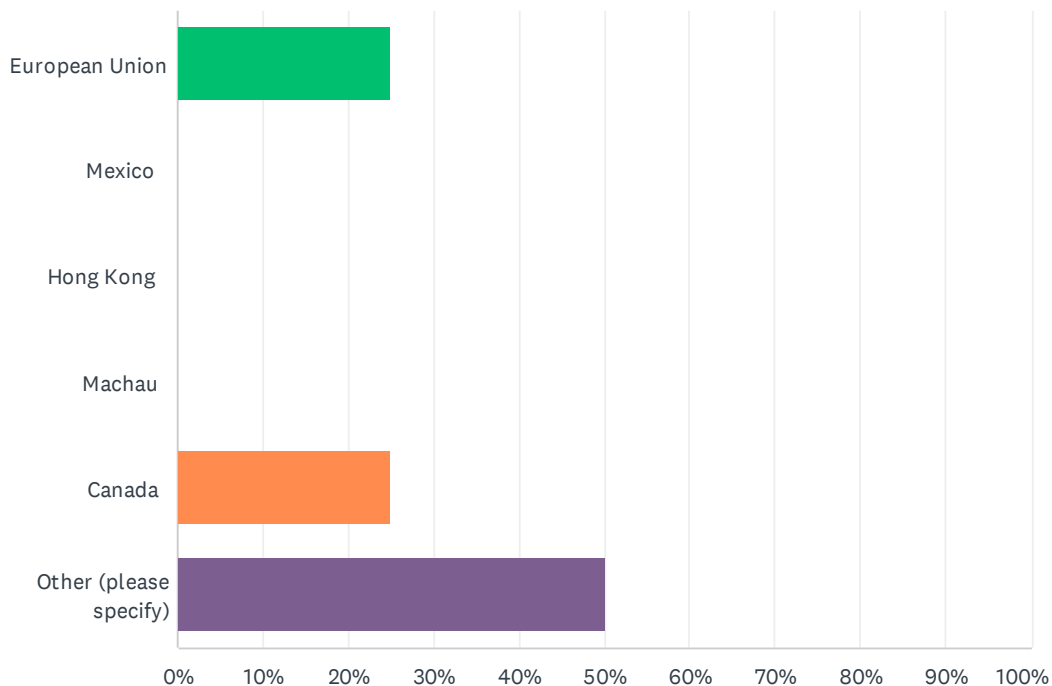
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Large increase for grain-finished product compared to grass-finished	12.50%	1
Small increase in demand for grain finished product compared to grass-finished	12.50%	1
No change	62.50%	5
Small increase in demand for grass-finished product compared to grain-finished product	0.00%	0
Large increase in demand for grass-finished product, compared to grain-finished product	12.50%	1
<b>TOTAL</b>		<b>8</b>

## Q26 U.S. MARKETERS ONLY: Did you export bison meat to the following countries in 2020?

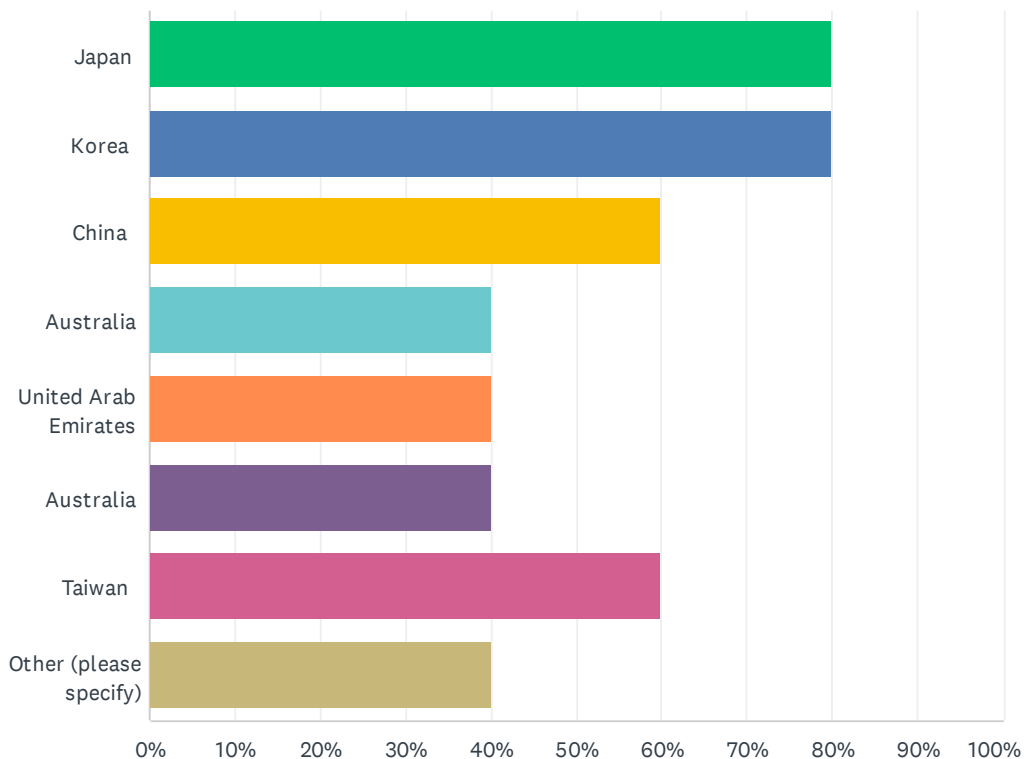
Answered: 4 Skipped: 4



ANSWER CHOICES	RESPONSES	
European Union	25.00%	1
Mexico	0.00%	0
Hong Kong	0.00%	0
Machau	0.00%	0
Canada	25.00%	1
Other (please specify)	50.00%	2
<b>TOTAL</b>		<b>4</b>

## Q27 U.S. MARKETERS ONLY: What other export markets could be useful for your business?

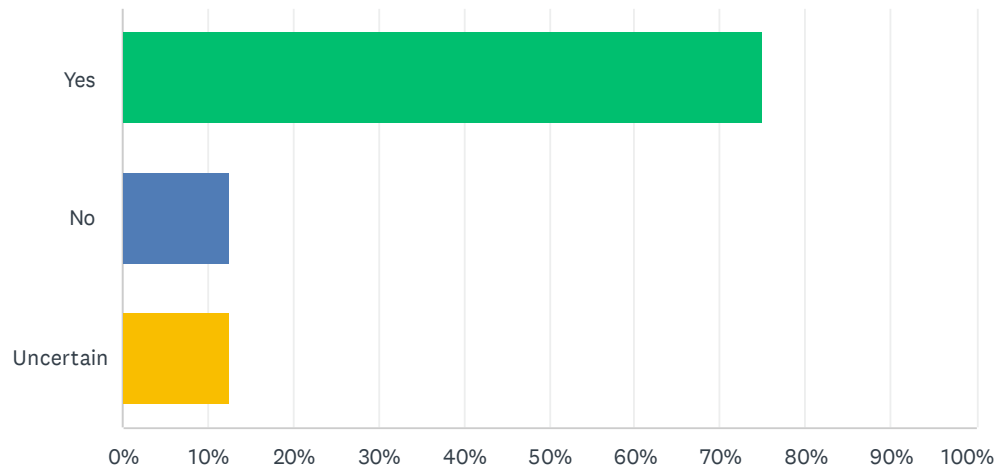
Answered: 5 Skipped: 3



ANSWER CHOICES	RESPONSES
Japan	80.00% 4
Korea	80.00% 4
China	60.00% 3
Australia	40.00% 2
United Arab Emirates	40.00% 2
Australia	40.00% 2
Taiwan	60.00% 3
Other (please specify)	40.00% 2
Total Respondents: 5	

## Q28 Are you planning to expand your business in the next 12 months?

Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	75.00%	6
No	12.50%	1
Uncertain	12.50%	1
<b>TOTAL</b>		<b>8</b>

**Q29 Let us know any changes that you are making in your business as a result of the current supply/price situation**

Answered: 4 Skipped: 4

**Q30 Please let us know any other thoughts about the future of the commercial bison marketing business you'd like to share.**

Answered: 2 Skipped: 6

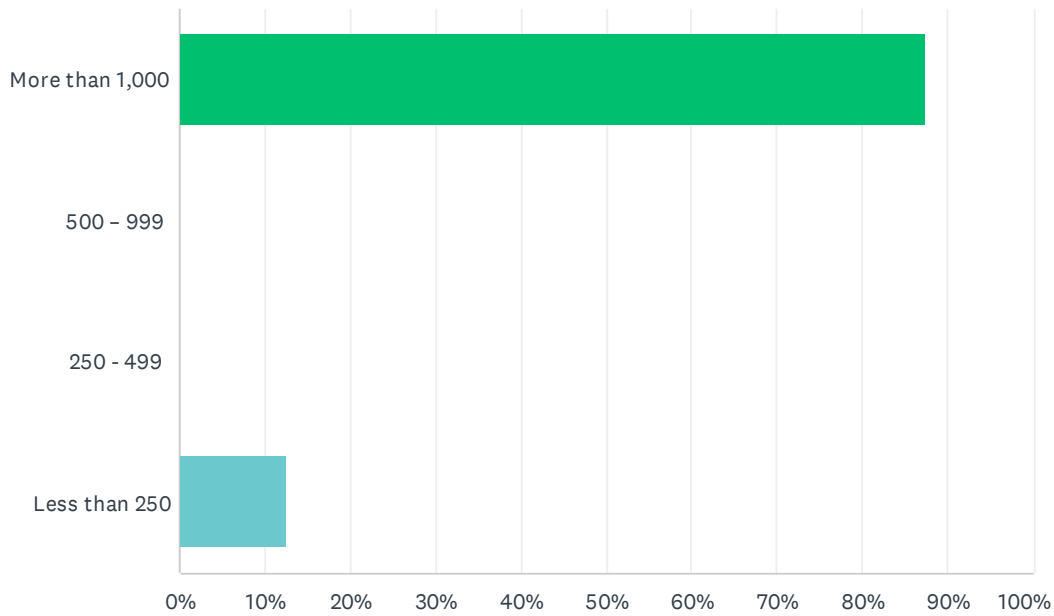
## Q31 Where do you believe the NBA should be focusing its marketing efforts?

Answered: 3 Skipped: 5



### Q32 How many bison did you process in the most recent calendar year?

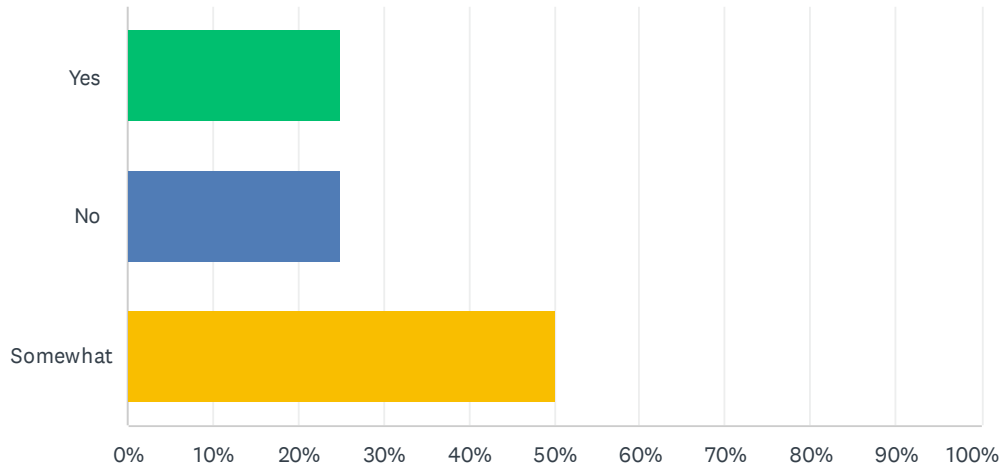
Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES
More than 1,000	87.50% 7
500 - 999	0.00% 0
250 - 499	0.00% 0
Less than 250	12.50% 1
<b>TOTAL</b>	<b>8</b>

### Q33 USDA Introduced the weaned calf report last year. Is this report a useful tool?

Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	25.00%	2
No	25.00%	2
Somewhat	50.00%	4
<b>TOTAL</b>		<b>8</b>