



National Bison Association 2017 Annual Report

BISON 1 MILLION

#bison1million





Another year of growth & strength

It was another year for growth, stability and profitability in the bison business.

Prices paid for market-ready animals finished the year near the all-time highs. Live animal prices softened a bit in the major

sales at the end of the year, but many bison business analysts see that trend as a sign of stability.

And, bison continues to show up on more restaurant menus and in retail meat cases. Bison is even making an appearance in Fido's dinner bowl, bringing extra value to ranchers as pet food companies seek the hearts, livers and byproducts for their products.

This past year was also a time to celebrate, as 650 ranchers, marketers and enthusiasts gathered in Big Sky, MT for the International Bison Conference. This event—held once every five years—launched two major initiatives that will have long-lasting impacts.

The first was *Bison 1 Million*, a commitment to restore one million bison to North America. This commitment grew out of the coalition effort that resulted in enactment of legislation designating bison as the National Mammal in 2016. The ranchers, conservationists, and tribal leaders who led the effort to pass that legislation continue to work to restore bison to private, public and tribal lands across North America.

The second initiative was *Bison Hump Day*, a playful campaign to encourage consumers to incorporate bison into their meal planning on Wednesdays. After all, Wednesday as *Bison Hump Day* is a lot more fun than Meatless Monday, and broader in appeal than Taco Tuesday. This campaign engages our customers to play the key role in providing the incentive for continued bison restoration.

Meanwhile, the National Bison Association continued to “take care of business” throughout 2017. A two-day strategic planning session conducted by the Board of Directors in March established a strategic plan for your association to focus its efforts and its resources over the next three years. In September, a delegation of 20 members spent three days in Washington, D.C., addressing public policy priorities for bison producers.

We continued to build vital relationships beyond or fence lines.

Our outreach efforts at FFA, the National Association of Farm Broadcasters, and the National Agricultural Bankers' Conference helped introduce us to new resources, and potential new producers.

The NBA Science and Research Committee is involving leaders from land grant universities, tribal colleges, and private companies to address long-term issues involving bison health and nutrition.

Our ongoing working relationship with the InterTribal Buffalo Council took a step forward as each organization welcomed a representative from the other as an advisor to our respective boards of directors.

Last year was a time of growth. Even as we grow, we recognize that bison will never be—and should never be—just another agricultural commodity. Bison have a special place in the hearts of the American public and will continue to have a special place in the marketplace in the U.S. and abroad.

All the Best,

Dave Carter
Executive Director



The National Bison Association is a big tent with room for producers large and small. This was evident during the closing day of the 2017 International Bison Conference, when Ted Turner and his staff hosted the attendees at the Flying D Ranch near Big Sky, MT.

Agriculture's bright spot of stability

Times are tough throughout much of agriculture today. Persistently low commodity prices are testing the survival of many mainstream farmers and ranchers.

Bison isn't mainstream. During the past two decades, bison producers have carved out a special relationship with customers who value high-quality meat without added growth hormones or antibiotics.

The National Bison Association worked hard to build that relationship by promoting bison as a protein in the sweet spot of intersecting concerns among a growing segment of the public: great tasting, nutritionally superior, sustainably ranched, and humanely raised. Individual marketers promoted that same "sweet spot" message and have backed it up by delivering high quality products to the marketplace.

The future for bison looks robust. Each day, more people are discovering the deliciously healthy taste of bison for the first time, whether ordering at a restaurant or sampling it on a toothpick at a farmers' market.

The average price received for a young bull carcass—which averaged \$1.60/lb. when the USDA first start-

ed keeping track of this information in 2004—topped \$4.00/ lb. in 2011 and has increased steadily since then. As 2017 came to a close, marketers were paying producers more than \$4.80/lb. for young bulls carcasses.

Now, with the launch of Bison 1 Million and the Wednesday Bison Hump Day campaign, we are committed to continued growth, strength and profitability.

"If the ranchers who produce bison for the meat market are successful in increasing their herds to meet this goal, bison meat will remain a niche product, but they hope it will be one that will appeal to Americans hungry for premium red meat with a healthy fat profile, genuine authenticity and the taste of adventure."

Laurie Baumann
Gourmet News
September 2017

USDA Monthly Bison Report Summary

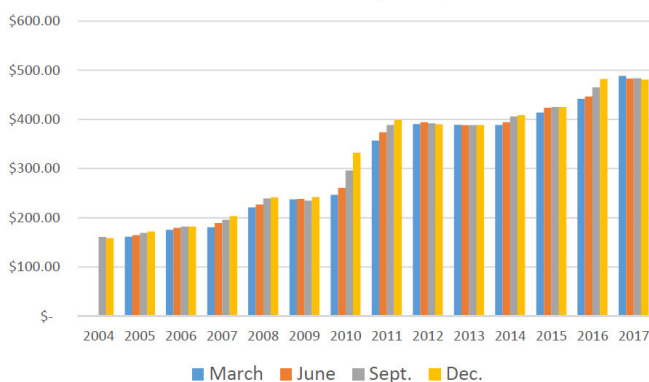
Dressed Wholesale Carcass Prices (Price/lb.)

	Dec. 17 Weighted Avg.	Dec. 16 Weighted Avg.	Dec. 12 Weighted Avg.	One Year % Difference	Five Year % Difference
WHOLESALE PRICES					
Young Bulls	\$ 4.81	\$ 4.82	\$ 3.90	0%	23%
Young Heifers	\$ 4.72	\$ 4.75	\$ 3.74	-1%	26%
Aged Bulls	\$ 4.19	\$ 4.13	\$ 2.87	2%	46%
Aged Cows	\$ 4.13	\$ 4.06	\$ 2.82	2%	47%

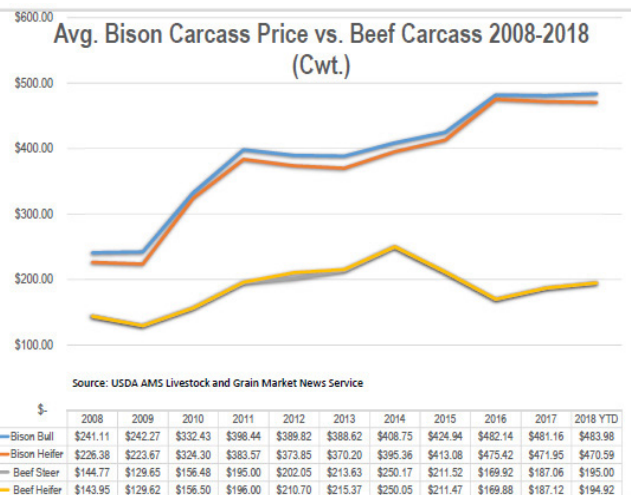
Source: USDA AMS Grain and Livestock Market Reporting Service

Prices paid for market-ready bison more than doubled from 2008 - 2016, and continue to hold at historic high levels. Growing consumer demand is the reason.

Quarterly Young Bull Carcass Prices 2004 - 2017 (Cwt.)



Avg. Bison Carcass Price vs. Beef Carcass 2008-2018 (Cwt.)



Promoting product, restoring herds

As the national voice for bison, the NBA is actively promoting our high quality, sustainably raised meat, as well as the opportunities to expand herds across the United States.

Bison Hump Day – The National Bison Association launched Wednesday *Bison Hump Day* at the International Bison Conference in July. This campaign offers marketers a fun, lighthearted way to engage with their customers—and potential customers by encouraging people to include bison in their mid-week meals.

A National Voice for Bison – The National Bison Association continues to be the go-to source of information for journalists and policymakers alike. Through our efforts this year, the bison business received significant favorable coverage in publications ranging from *Bloomberg Businessweek* to *Gourmet News*.

New Focus on Social Media – The NBA's expanded presence on Facebook and Instagram is helping to engage with the public. We continue to build important relationships with food bloggers across the country.

All-New Website – The NBA revised and updated its website in 2017, focusing on a clean look that provides easy access to information for producers, consumers, journalists, and others.

Farmers' Market Promotion – With assistance of a grant from the U.S. Department of Agriculture, the National Bison Association has developed new tools for producers engaged in direct marketing and agritourism. Those tools range from feather flags for use at farmers' market booths to an all-new resource guide for direct marketers.



NBA feather flags draw attention--and customers--to farmers' market booths

Special Publications to Promote Bison Products

-- The *Bison World* food supplement provides attractive and useful marketing tools for marketers to use in helping to promote under-utilized cuts of bison meat. The *Why Bison* pamphlet continues to serve as a brief informative brochure, and special recipe cards are available to marketers throughout the business.

Bison Finder 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.

National Bison Day -- For the fifth consecutive year, the NBA partnered with the Wildlife Conservation Society and the InterTribal Buffalo Council to successfully convince 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.

National Association of Farm Broadcasting – Through our continued presence at the NAFB annual Trade Talk event, the NBA continues to get our message out via the rural media and build valuable relationships with agricultural journalists.



Claiming Wednesdays as Bison Hump Day has given producers and marketers a fun new tool to engage with the public and build sales.

"(T)he bison business is thriving. The meat is healthier than beef, with more protein and less fat than salmon, and it is also more lucrative for ranchers. Nearly 60 percent of bison marketers reported an increase in demand, and 67 percent said they were planning to expand their businesses, according to a survey in May by the National Bison Association, an industry group."

Deena Shanker
Bloomberg Businessweek
August 2017

Healthy herds: Growth begins here

Bison 1 Million.

This simple phrase evokes images of bison roaming across much of their historic range. This phrase also represents a commitment among bison producers and managers on private, tribal and public lands across North America to work together to build the herds. And it is capturing the attention and the involvement of allies outside our business to help us move toward one million bison.

Establishing Nutritional Requirements for Bison –

After meeting with the National Academy of Science and the USDA's National Institute for Food and Agriculture, National Bison Association's Science and Research Committee has initiated the process to identify the nutritional requirements for bison. Working in concert with the National Buffalo Foundation, the committee is conducting a thorough literature review of existing information as a first step in the process.

Expanding the Scientific Knowledge on Bison –

The Science and Research Committee, along with representatives from the National Buffalo Foundation, met with animal science researchers from South Dakota State University, and the Provost of Sinte Gleske University in April to explore collaboration on new research to protect the health of bison herds.

Building Relationships with Tribal Producers – In 2014, the National Bison Association and the Inter-Tribal Buffalo Council established a Memorandum of Agreement committing the organizations to work together. In 2017, this commitment took another step forward as the NBA added an ITBC representative as an ex officio member to the board, and the ITBC reciprocated by adding an NBA representative as an advisor to their board. NBA Executive Director Dave Carter also conducted Bison Advantage workshops on the Pine Ridge and Rosebud Reservations.

New Technology to Benefit Traditional Production

Representatives of Microsoft Corp. have committed to work with the NBA to identify opportunities to harness cutting edge technology to help build healthy grasslands, and healthy herds.

Addressing the Urgent and Immediate Needs –

With *Mycoplasma bovis* threatening the health of bison herds, and the economic stability of bison producers, the NBA is pulling together a working group of professionals to coordinate the industry's response to this ever-evolving menace.

Connecting with 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.



Researchers from South Dakota State University listen to a presentation on bison herd health issues in Brookings, SD in April.

New Financial Resources for Producers – The National Bison Association this year hosted a booth for the first time at the National Agricultural Bankers conference to provide those lenders with information regarding the growth and stability of the bison business. NBA Executive Director Dave Carter also made a presentation to the National Association of Rural Rehabilitation Corporations, a group representing state-based ag lending agencies. And, a series of materials developed by the NBA helped arm bison producers with information requested by their local lenders.

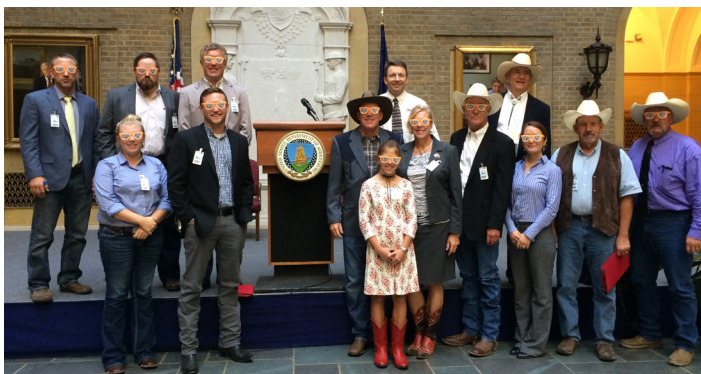
Resources for New Producers – The 2nd Edition *Bison Producers' Handbook*, produced in 2016, continues to serve as the definitive resource guide for new producers and seasoned veterans alike. Meanwhile, prospective producers can expand their knowledge with the on-line Bison 101, 201 and 301 curricula, and the *Insiders' Guide* DVD.

We feel that the NBA is a tremendous source of information. Your team has always been very responsive to questions. We couldn't have become bison owners without the NBA. Thank you!

-Nancy Carter,
Banfield Bison

The Voice for bison on public policy

It's a long distance from most bison ranches to Washington, D.C., but policy decisions in the nation's capital directly impact the market growth and the bottom line for our business. In 2017, the NBA worked closely with policy officials at USDA, and with lawmakers drafting the next Farm Bill. Those efforts were strengthened by the hard work of our delegation of 20 bison producers who conducted more than 25 meetings with officials during the three-day Policy Roundup in Washington, D.C.



The team of grassroots lobbyists from the NBA took a break from a series of serious meetings at USDA in September to pose for a group photo...with Hump Day glasses, of course.

Fair Compensation Under the Livestock Indemnity Program – After learning that the USDA's methodology for determining the compensation levels for bison claims had not been adjusted since 2008, the NBA initiated a series of meetings with officials at USDA Farm Service Agency. The result: FSA is updating its methodology to reflect the current market value for bison. This will mean as much as a 124% increase in the compensation levels.

Bison Research Priorities – Meetings with USDA's Agricultural Research Service, the National Institute for Food and Agriculture and the National Academy of Science have resulted in identifying resources to help address the long-term health of bison herds, as well as the immediate threats posed by diseases such as *Mycoplasma bovis*.

Expanded Export Opportunities for Bison – USDA's Foreign Agricultural Service in 2017 opened markets in Hong Kong and Macau for U.S. bison meat exports and continued to work on reopening Korea for U.S. bison meat as well.

Working for Fair Trade – The National Bison Association is represented on USDA's Agricultural Trade Advisory Committee for Animals and Animal Products. We are working with the major livestock representatives on that committee to make sure that any renegotiation of NAFTA does not impede the solid relationship among producers in the United States and Canada.

Additional Focus on Beginning Rancher Assistance – USDA's Farm Service Agency is working to provide their state/local offices with information and resources that can be useful in providing financing for young and beginning bison ranchers.

Long Term Bison-Friendly Policies – The National Bison Association and InterTribal Buffalo Council have jointly identified key priorities to advocate in the next Farm Bill to support the growth of sustainable, profitable bison production on private and tribal lands. Two key senators have committed to holding listening sessions on bison ranches in 2018.

Fighting Anti-Bison Policies – Not all public policy impacting bison occurs in Washington, D.C. After several Montana Soil Conservation Districts enacted ordinances unfairly restricting bison in their jurisdictions, the National Bison Association teamed up with the Montana Bison Association to address this situation. NBA Assistant Director Jim Matheson traveled to Montana to meet with several county officials, and to secure a pledge from several counties to revisit those ordinances.

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.



U.S. Sen. Heidi Heitkamp (D-ND) listens as representatives of the NBA present their priorities for the next long-term Farm Bill.

IBC 2017: A celebration of success

When bison producers get together, good things happen. And, producers—along with marketers and friends of the herd—got together in a big way in July 2017. The 650 ranchers, marketers and enthusiasts gathering in Big Sky, MT for the fifth-ever International Bison Conference marked the largest gathering of the bison community this century. The event kicked off with a cookout and concert by Michael Martin Murphey on July 4th and concluded with a special luncheon and tour under a giant tent at Ted Turner's Flying D Ranch. In between, attendees enjoyed informational sessions, tours, culinary demonstrations, and a time to get together with old friends and new.

In January 2017, the National Bison Association's 22nd annual Winter Conference brought together upward of 500 members and friends for three days of activities in Denver, CO. That event also marked the celebration of the designation of bison as America's official National Mammal.



More than 650 producers and enthusiasts convened in Big Sky, MT in July for education, fellowship and fun. Above, Eating Well Editor Jessie Price moderates a cooking presentation during the conference. Above right, NBA Executive Director Dave Carter conducts a media interview. Near right, Carter and former NBA President Mike Duncan unveil the Bison Hump Day campaign. Far right, Michael Martin Murphey entertains attendees on July 4th. Bottom, bison grazing at the Flying D provide a picturesque backdrop for the closing day.



Membership: An important investment

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

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

Bison World Magazine -- 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. Bison 201 and 301 contain valuable interactive worksheets and other resources that can help you develop your bison business plan.

Nationwide Insurance for Bison Producers -- 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 & Sale -- This annual event offers producers the opportunity to buy premier breeding stock to improve and expand their herds.

Junior Judging Competition -- The NBA Junior Judging Contest is drawing growing participation from around the country.



National Bison Association

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