



# BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - November 27, 2017.

## Weekly Federal Bison Slaughter

	07-Oct	14-Oct	21-Oct	28-Oct	Oct Total	January - October YTD		
						2017	2016	% Change
<b>Total Canada</b>	122	177	211	223	733	7,676	8,126	-5.5%
<i>previous year</i>	191	185	161	221	758			

## Provincially Inspected Slaughter

	May 2017	June 2017	July 2017	Aug 2017	Sept 2017	Sept 2016	January - September YTD		
							2017	2016	% Change
<b>Alberta</b>	57	53	40	64	42	62	478	661	-27.7%
<b>Saskatchewan</b>	8	6	3	6	5	2	52	69	-24.6%
<b>Manitoba/BC</b>	45	46	22	25	22	24	317	289	9.7%
<b>Ontario/Quebec**</b>	39	52	34	48	48	23	307	150	104.7%
<b>Total</b>	149	157	99	143	117	111	1,154	1,169	-1.3%

	YTD 2017	YTD 2016	% Change
<b>Total Canadian Federal and Provincial Slaughter *</b>	8,830	9,295	-5.0%

\*Source AAFC Red Meat Section : Due to varying provincial reporting schedules, total Fed. and Prov. has a one month delay in Prov. Data

## Canadian Production

	2011	2012	2013	2014	2015	2016	January - September YTD		
							2017	2016	% Change
<b>Total Slaughter</b>	13,048	13,587	14,388	14,371	14,186	11,568	8,097	8,537	-5.2%
<b>Total Live Exports</b>	14,465	14,007	16,769	19,033	26,162	18,364	13,194	15,322	-13.9%
<b>Total Production</b>	27,513	27,594	31,157	33,404	40,348	29,932	21,291	23,859	-10.8%

\*source : Canadian Food Inspection Agency, Provincial Governments, and USDA APHIS

## US Federal Slaughter\*

	07-Oct	14-Oct	21-Oct	28-Oct	Oct Total	January - October YTD		
						2017	2016	% Change
<b>for week ending:</b>	1,150	942	1,120	957	4,169	43,785	44,397	-1.4%
<i>previous year</i>	1,080	1,120	805	915	3,920			

\*actual slaughter numbers in federally inspected plants, not necessarily inspected, source : USDA

## Canada Live Bison Exports to US

	June-17	July-17	August-17	September-17	October-17	January - October YTD		
						2017	2016	% Change
<b>Slaughter Male</b>	1027	927	426	595	588	6,431	6,103	5.4%
<b>Slaughter Female</b>	381	583	558	159	362	4,071	4,528	-10.1%
<b>Feeder Male</b>	0	71	124	0	86	2,523	3,616	-30.2%
<b>Feeder Female</b>	90	0	115	0	36	1,241	1,983	-37.4%
<b>Total</b>	1,498	1,581	1,223	754	1,072	14,266	16,230	-12.1%

\*source : USDA, APHIS

## Canadian Fresh or Chilled Bison Meat Exports

		April 2017	May	June	July	August	September	January - September YTD			
								2017	2016	% Change	
<b>Boneless</b>	<b>USA</b>	Kg	40,529	25,602	28,528	42,598	29,912	26,487	351,101	448,791	-21.8%
	Value (\$Cdn)	914,879	614,941	583,667	373,676	579,642	548,330	5,773,427	6,525,393	-11.5%	
<b>France</b>	Kg	4,731	2,474	3,597	1,115	2,946	3,127	28,953	33,874	-14.5%	
	Value (\$Cdn)	95,702	55,947	79,222	24,530	65,858	66,769	621,222	697,520	-10.9%	
<b>Switzerland</b>	Kg	8,126	712	2,389	7,477	3,094	3,107	38,070	39,858	-4.5%	
	Value (\$Cdn)	304,846	24,246	64,709	262,225	88,170	88,559	1,210,687	1,507,495	-19.7%	
<b>Netherlands</b>	Kg	-	271	7,486	812	627	-	13,258	411	3125.8%	
	Value (\$Cdn)	-	12,252	69,662	34,068	26,551	-	226,306	16,818	1245.6%	
<b>Germany</b>	Kg	-	-	-	-	-	-	-	-	N/A	
	Value (\$Cdn)	-	-	-	-	-	-	-	-	N/A	
<b>French Southern Terr.</b>	Kg	-	-	-	-	-	-	-	-	N/A	
	Value (\$Cdn)	-	-	-	-	-	-	-	-	N/A	
<b>Belgium</b>	Kg	-	-	-	-	-	-	-	-	N/A	
	Value (\$Cdn)	-	-	-	-	-	-	-	-	N/A	
<b>Other Countries</b>	Kg	-	-	-	-	-	-	-	990	-	
	Value (\$Cdn)	-	-	-	-	-	-	-	23,669	-	
<b>Total</b>	<b>Kg</b>	53,386	29,059	42,000	52,002	36,579	32,721	431,382	523,924	-17.7%	
	<b>Value (\$Cdn)</b>	1,315,427	707,386	797,260	694,499	760,221	703,658	7,831,642	8,770,895	-10.7%	

## Bone-in

		April 2017	May	June	July	August	September	January - September YTD		
								2017	2016	% Change
<b>Total</b>	<b>Kg</b>	771	863	6,518	3,945	158	63,879	148,693	27,282	445.0%
	<b>Value (\$Cdn)</b>	15,632	13,808	39,560	37,751	3,373	186,662	987,869	243,846	305.1%

## Total Exports, Boneless and Bone-in

		April 2017	May	June	July	August	September	January - September YTD		
								2017	2016	% Change
	<b>Kg</b>	54,157	29,922	48,518	55,947	36,737	96,600	580,075	551,206	5.2%
	<b>Value (\$Cdn)</b>	1,331,059	721,194	836,820	732,250	763,594	890,320	8,819,511	9,014,741	-2.2%

\*Source: Statistics Canada (HS Code 02013010 - Bison cuts boneless, fresh or chilled and HS Code 02012010 - Bison cuts bone in, fresh or chilled)

**US Bison Carcasses - Grain Fed (Hot Carcass Wt \$US/cwt) FOB Plant Basis**

*wghtd avg*

	Bulls (UTM)	Heifers (UTM)	Bulls (OTM)	Cows (OTM)
Oct 2016	473.32	484.46	436.29	393.95
Nov 2016	468.92	453.88	413.78	397.58
Dec 2016	482.14	475.42	413.10	405.75
Jan 2017	485.96	452.06	410.89	405.38
Feb 2017	489.58	466.48	419.09	444.59
Mar 2017	488.07	468.30	413.91	399.43
Apr 2017	488.74	473.03	411.61	397.55
May 2017	482.64	477.37	410.77	399.21
June 2017	483.34	472.84	410.26	401.69
July 2017	487.42	464.74	414.44	391.84
Aug 2017	483.10	468.29	411.54	402.45
Sept 2017	483.69	490.24	410.53	444.32
Oct 2017	487.27	466.26	402.50	438.24

*\*source USDA*

**Canadian Bison Carcasses - Grain Fed (Hot Carcass Wt Cdn\$/cwt) FOB Plant Basis**

*wghtd avg*

	Bulls	Heifers	Mature Bulls	Mature Cows
Nov 2016	600-625	575-600	500-515	500-515
Dec 2016	600-625	575-600	500-515	500-510
Jan 2017	600-650	575-600	500-515	500-510
Feb 2017	600-650	575-600	500-515	500-510
Mar 2017	625-650	600-630	500-515	500-510
Apr 2017	625-650	600-630	525-550	525-550
May 2017	625-650	600-630	525-550	525-550
June 2017	625-650	600-630	525-550	525-550
July 2017	625-650	600-630	525-550	525-550
Aug 2017	625-640	600-640	500-550	500-550
Sept 2017	600-625	575-625	500-550	500-550
Oct 2017	600-625	575-625	500-550	500-550
Nov 2017	600-625	575-625	500-550	500-550

*\*source CBA survey of marketers*

**USDA Key Cuts - Grain Fed Wholesale (\$US/cwt)**

	August 2017		September 2017		October 2017		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,390-1,833	1,445.90	1,350-1,870	1,490.38	1,350-1,870	1,459.12	0.9%	-2.1%
Chuckroll/Clod Fresh	620-870	739.94	620-825	709.88	620-900	692.11	-6.5%	-2.5%
Striploin Fresh	1,060-1,650	1,258.93	1,095-1,600	1,271.26	1,095-1,650	1,180.40	-6.2%	-7.1%
Tenderloin Fresh	1,900-2,620	1,941.12	1,600-2,620	2,039.98	1,800-3,125	2,075.98	6.9%	1.8%
Ground 90% Bulk, Fresh	600-800	754.07	600-750	663.00	600-750	640.00	-15.1%	-3.5%
Ground 85% Bulk, Frozen	654-1,050	780.21	619-1,027	762.57	700-1,034	773.48	-0.9%	1.4%
Ground 85% Patties, Frozen	650-932	775.31	650-896	771.77	650-995	777.43	0.3%	0.7%

*\*source USDA*

**Canadian Bison Cuts - Grain Fed Wholesale (\$Cdn/kilogram)**

	Mid-August 2017 Pricing	Mid-September 2017 Pricing	Mid-October 2017 Pricing	Mid-November 2017 Pricing
Tenderloin - Fresh	\$40.95 - \$57.00	\$40.95 - \$57.00	\$40.95 - \$60.00	\$40.95 - \$60.00
Strip Loin Boneless - Fresh	\$36.00 - \$37.00	\$36.00 - \$37.00	\$36.00 - \$38.00	\$36.00 - \$38.00
Inside Round - Fresh	\$21.95 - \$22.00	\$21.95 - \$22.00	\$21.50 - \$22.00	\$21.50 - \$22.00
Ground 90% Bulk Fresh	\$20.95 - \$23.93	\$20.95 - \$23.93	\$20.95 - \$23.93	\$20.95 - \$23.93
Fresh Bison Trim	\$19.45 - \$22.25	\$19.45 - \$21.00	\$19.00 - \$21.00	\$19.00 - \$21.00

*\*source CBA survey of marketers*

**Live Auction Reports** \*most recent reported, may not reflect current market

CANADIAN BISON ASSOCIATION 2017 SHOW & SALE REPORT (SK - November 21, 2017)	67 total head	Kramer Auction Sales (SK) (May 10, 2017)			501 head	Vold, Jones & Vold Auction Co. Ltd. (AB) (March 18, 2017)		
		CLASS	# of head	Avg (\$/lb)		Head Sold: 579		
<b>2-year old bulls</b>	12 head	<b>2016 BULLS</b>			<b>Calves</b>	<b>Bulls</b>	<b>Heifers</b>	
Average Weight	1,563	600 and Over	29	\$4.05	500 lbs +	\$440.00 - \$520.00	\$320.00 - \$370.00	
Average\$	\$11,458.33	551-600lbs	81	\$5.49	400 - 499 lbs	\$420.00 - \$560.00	\$440.00 - \$510.00	
<b>Yearling bulls</b>	14 head	501-550lbs	68	\$5.41	300 - 399 lbs	\$520.00 - \$620.00	\$440.00 - \$530.00	
Average Weight	1,178	451-500lbs	49	\$5.55	Under 300 lbs	\$550.00 - \$660.00	\$470.00 - \$570.00	
Average\$	\$10,107.14	401-450lbs	42	\$5.21	<b>Yearlings</b>	<b>Bulls</b>	<b>Heifers</b>	
<b>Bred 2 year olds</b>	10 head	351-400lbs	12	\$4.94	700 - 799 lbs	\$320.00 - \$370.00		
Average Weight	1,173	Under 350	13	\$5.15	600 - 699 lbs	\$350.00 - \$390.00	\$320.00 - \$370.00	
Average\$	\$9,350.00	Off Types	4	\$4.08	500 - 599 lbs	\$360.00 - \$440.00	\$300.00 - \$350.00	
<b>Yearling heifers</b>	9 head	<b>2015 BREEDING BULLS</b>			400 - 499 lbs	\$420.00 - \$500.00	\$270.00 - \$330.00	
Average Weight	964	Over 1201	5	\$4.91	<b>Mature Bulls</b>			
Average\$	\$5,038.89	1101-1200 lbs	1	\$3.57	1250 lbs +	\$280.00 - \$310.00		
<b>Pen of Two 2 year old</b>	8 head	1000-1100 lbs	1	\$4.36	950 - 1249 lbs	\$290.00 - \$330.00		
<b>Bred heifers</b>	1,134	<b>2015 BULLS</b>			<b>Mature Cows</b>			
Average Weight	\$7,125.00	751-800 lbs	1	\$3.50	950 lbs +	\$290.00 - \$310.00		
Average\$		701-750 lbs	3	\$3.60	700 - 949 lbs	\$270.00 - \$300.00		
<b>Pen of Two Yearling heifers</b>	14 head	601-700lbs	6	\$3.38	Younger Breds	\$2,600.00 - \$2,900.00		
Average Weight	899	Under 600	5	\$3.44	Older Bred	\$2,100.00 - \$2,500.00		
Average\$	\$4,057.14	<b>2014 BULLS</b>			<b>2015 HEIFERS</b>	<b># of head</b>	<b>Avg (\$/lb)</b>	
<b>SALE AVERAGE</b>	\$7,935.00	600 - 650 lbs	3	\$3.70	651-700 lbs	10	\$4.10	
		<b>2016 HEIFER CALVES</b>			601-650 lbs	4	\$4.28	
		600-700lbs	2	\$5.50	551-600 lbs	6	\$4.12	
		501-599lbs	23	\$5.42	Under 550	3	\$3.93	
		451-500lbs	31	\$5.08				
		401-450lbs	45	\$5.16				
		351-400lbs	25	\$4.48				
		Under 350	23	\$4.73				
		Off Types	6	\$3.72				

(cont'd)

**Commentary**

By Terry Kremeniuk, Executive Director, CBA

This report can only be improved with your feedback. Please send any comments that you have to either [cba2@sasktel.net](mailto:cba2@sasktel.net) or [diane.blandford@agr.gc.ca](mailto:diane.blandford@agr.gc.ca)

Prices offered to producers to mid-November were stable with prices as high as \$6.00 per pound HHW for Grade "A" bulls. U.S. buyers are offering prices that equate to \$6.00 Canadian with returns dependent on quality, transport incentives, and export costs. Canadian buyers are paying up to \$6.00 per pound HHW for Grade "A" heifers. U.S. buyers are offering prices that equate to Canadian prices with returns dependent on quality, transport incentives, and export costs.

Nationally, federal slaughter in Canada for the first 45 weeks of 2017 (week ending November 11, 2017) was down 5.6% when compared to the same period in 2016 (8,116 animals in 2017 compared to 8,594 animals in 2016). Live animal exports to the US in the first nine months of 2017 were at 15,927 head, 14.5% below the 18,628 head exported during January – September 2016.

Marketers report that strong demand for bison trim continues. The demand for middle cuts has been steady with little build-up of inventory reported. US demand continues to be steady. With the Comprehensive Economic Trade Agreement with the European Union having gone into effect on September 21, 2017, European demand is expected to increase. It is expected that the marketplace will take a few months to adjust to the new processes and conditions under the agreement.

Canadian demand is stable. The Canadian marketers indicate that present supplies of finished bison continue to be very tight.

Bison prices in Canada are expected to continue to be sensitive to Canada - US exchange rates with price changes expected as the Canadian dollar strengthens.

Chart 1

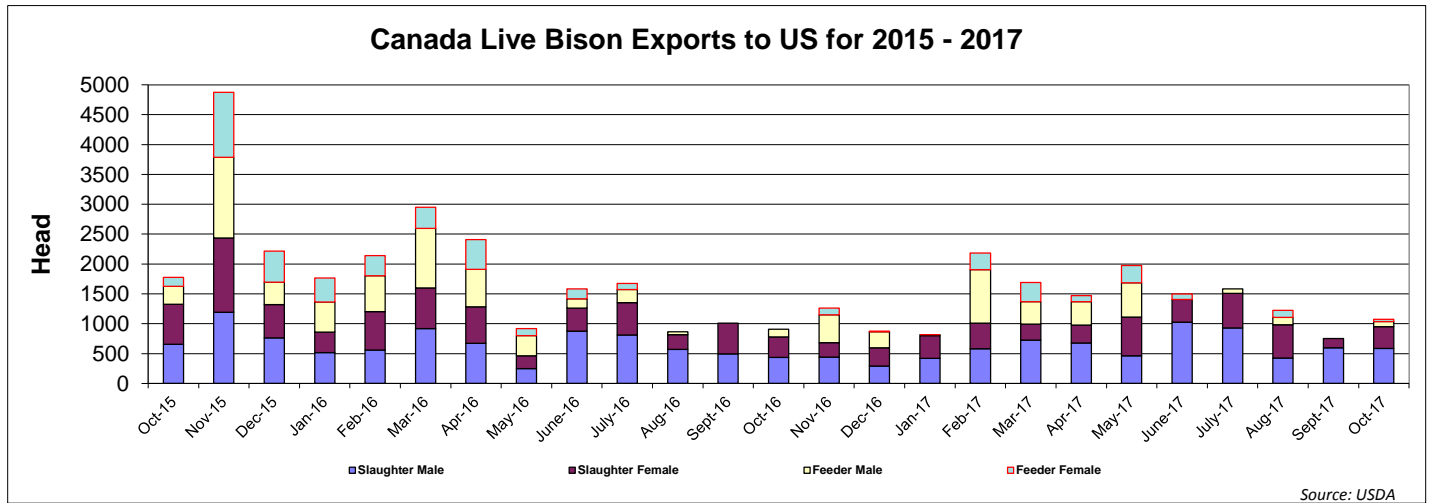
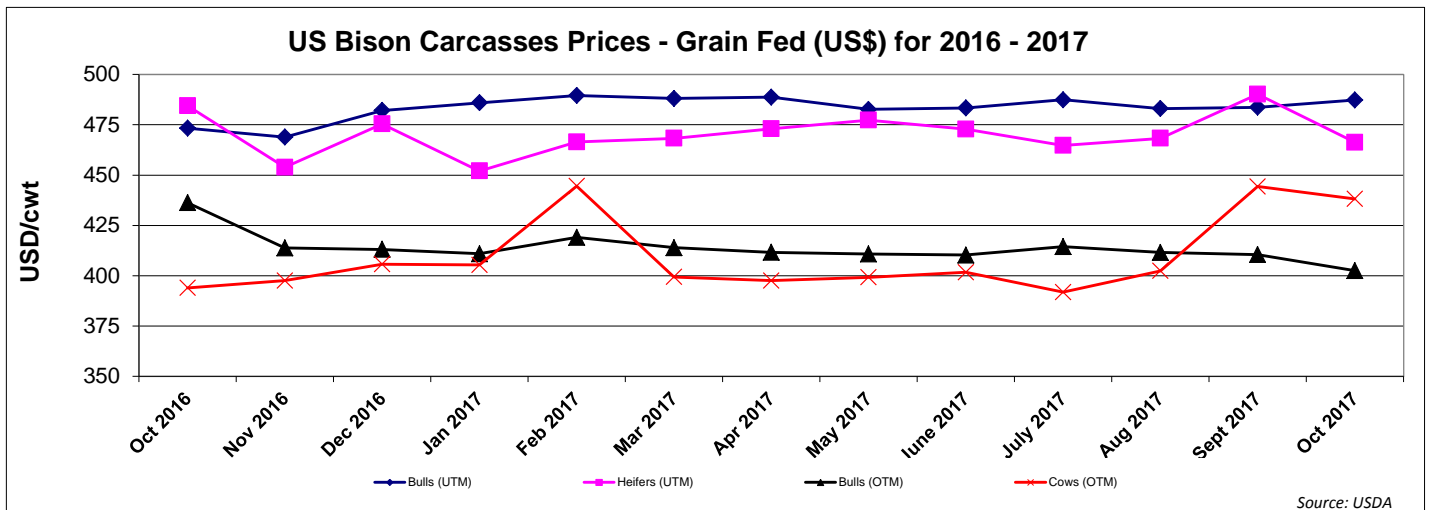


Chart 2



**The Canadian Bison Industry by the Numbers.....**

On another note, the 2016 Canadian Census of Agriculture data was released on May 10, 2017. Nationally, the number of bison farms and ranches reporting bison was at 81% of the 2011 levels. The number of bison reported on farms and ranches in 2016 was reported to be at about 95% of 2011 levels. According to the data, the average bison herd increased to 122 head.

Excluding the Atlantic region, there were declines in the number of farms and ranches ranging from 13.9% to 24.4% with the smallest decline in Saskatchewan and the greatest decline in Quebec.

Again excluding the Atlantic Region, the only province to report an increase in the number of bison was Saskatchewan (+2.7%), while Quebec reported the largest decrease (-35.4%).

	FARMS REPORTING BISON				NUMBER OF BISON REPORTED			
	2016	2011	2006	% Chg '16 vs '11	2016	2011	2006	% Chg '16 vs '11
Nfld and Labrador	0	0	0	-	0	0	0	-
Prince Edward Island	0	0	1	-	0	0	*	-
Nova Scotia	2	2	1	0.0%	*	*	*	-
New Brunswick	1	2	3	-50.0%	*	*	*	-
Quebec	34	45	69	-24.4%	1,538	2,380	4,322	-35.4%
Ontario	49	60	71	-18.3%	1,843	2,320	4,106	-20.6%
Manitoba	86	108	166	-20.4%	14,025	14,116	19,609	-0.6%
Saskatchewan	303	352	597	-13.9%	40,418	39,343	57,395	2.7%
Alberta	445	571	869	-22.1%	54,907	57,483	97,366	-4.5%
British Columbia	55	71	121	-22.5%	6,504	9,206	12,656	-29.4%
<b>Canada Total</b>	<b>975</b>	<b>1,211</b>	<b>1,898</b>	<b>-19.5%</b>	<b>119,314</b>	<b>125,142</b>	<b>195,728</b>	<b>-4.7%</b>

\* Note: In Atlantic Provinces, the number of farms reporting is too small to publically disclose the number of bison