Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada -November 26, 2018.

Weekly Federal Bison Slaughter

	6-Oct	13-Oct	20-Oct	27-Oct	October Total	January - October YTD 2018	2017	% Change
Total Canada	*92*	*125*	*220*	*24*	**461**	**6,896**	**7,676**	**-10.2%**
previous year	*122*	*177*	*211*	*223*	***733***			

Provincially Inspected Slaughter

	May 2018	June 2018	July2018	August 2018	September 2018	September 2017	January - September YTD 2018	2017	% Change
Alberta	58	71	50	47	51	42	488	478	2.1%
Saskatchewan	11	3	8	7	8	5	72	52	38.5%
Manitoba/BC	12	7	8	1	6	5	237	331	-28.4%
Ontario/Quebec**	46	39	47	37	40	48	292	307	-4.9%
Total	**127**	**120**	**113**	**92**	**105**	**100**	**1,089**	**1,168**	**-6.8%**

	YTD 2018	YTD 2017	% Change
Total Canadian Federal and Provincial Slaughter *	**7,985**	**8,844**	**-9.7%**

**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

	2012	2013	2014	2015	2016	2017	January - September YTD 2018	2017	% Change
Total Slaughter	13,587	14,388	14,371	14,186	11,568	10,886	8,035	8,931	**-10.0%**
Total Live Exports	14,007	16,769	19,033	26,162	18,364	17,600	14,658	14,266	**2.7%**
Total Production	**27,594**	**31,157**	**33,404**	**40,348**	**29,932**	**28,486**	**22,693**	**23,197**	**-2.2%**

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

US Federal Slaughter*

for week ending:	6-Oct	13-Oct	20-Oct	27-Oct	October Total	January - October YTD 2018	2017	% Change
	913	**884**	**952**	**990**	**3,739**	**38,544**	**39,616**	**-2.7%**
previous year	*1,150*	*942*	*1,120*	*957*	***4,169***			

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

Canada Live Bison Exports to US

	June-18	July-18	August-18	September-18	October-18	January - October YTD 2018	2017	% Change
Slaughter Male	964	961	963	1136	1009	7,681	6,431	**19.4%**
Slaughter Female	302	332	468	469	301	4,045	4,071	**-0.6%**
Feeder Male	189	73	73	229	0	1,992	2,523	**-21.0%**
Feeder Female	161	0	0	0	59	940	1,241	**-24.3%**
Total	**1,616**	**1,366**	**1,504**	**1,834**	**1,369**	**14,658**	**14,266**	**2.7%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		April 2018	May 2018	June 2018	July 2018	August 2018	September 2018	January - September YTD 2018	2017	% Change
USA	Kg	28,357	50,764	41,290	29,118	23,669	17,735	**296,590**	**351,101**	**-15.5%**
	Value ($Cdn)	600,032	884,520	756,657	554,030	525,677	304,612	**5,749,757**	**5,773,427**	**-0.4%**
France	Kg	3,205	26,451	3,599	2,493	3,520	4,933	**58,534**	**28,953**	**102.2%**
	Value ($Cdn)	108,769	531,580	122,954	79,568	92,141	140,765	**1,589,872**	**621,222**	**155.9%**
Switzerland	Kg	9,443	5,191	3,096	5,893	4,485	5,641	**50,507**	**38,070**	**32.7%**
	Value ($Cdn)	277,118	138,380	120,434	234,291	147,354	166,035	**1,613,952**	**1,210,687**	**33.3%**
Netherlands	Kg	1,019	450	173	-	156	955	**3,452**	**13,258**	**-74.0%**
	Value ($Cdn)	35,274	14,396	8,420	-	4,453	27,228	**121,085**	**226,306**	**-46.5%**
Mexico	Kg	-	-	-	-	29,696	38,992	**68,688**	**-**	**N/A**
	Value ($Cdn)	-	-	-	-	299,317	363,162	**662,479**	**-**	**N/A**
United Kingdom	Kg	10,200	4,743	-	-	9,129	20,232	**52,400**	**-**	**N/A**
	Value ($Cdn)	92,950	43,769	-	-	89,581	197,158	**499,776**	**-**	**N/A**
Saint Pierre and Miquelon	Kg	5,319	5,329	6,322	3,925	5,259	5,340	**41,507**	**-**	**N/A**
	Value ($Cdn)	46,117	44,698	58,923	35,587	49,135	46,926	**372,855**	**-**	**N/A**
Other Countries	Kg	-	-	-	-	487	35	**522**	**-**	**N/A**
	Value ($Cdn)	-	-	-	-	5,626	858	**6,484**	**-**	**N/A**
Total	**Kg**	**57,543**	**92,928**	**54,480**	**41,429**	**76,401**	**93,863**	**572,200**	**431,382**	**32.6%**
	Value ($Cdn)	**1,160,260**	**1,657,343**	**1,067,388**	**903,476**	**1,213,284**	**1,246,744**	**10,616,260**	**7,831,642**	**35.6%**

Bone-in		April 2018	May 2018	June 2018	July 2018	August 2018	September 2018	January - September YTD 2018	2017	% Change
Total	**Kg**	**13,764**	**10,141**	**44,206**	**35,469**	**21,264**	**33,582**	**316,824**	**148,693**	**113.1%**
	Value ($Cdn)	**196,341**	**99,159**	**630,721**	**498,358**	**284,393**	**452,136**	**2,956,780**	**987,869**	**199.3%**

Total Exports, Boneless and Bone-in		April 2018	May 2018	June 2018	July 2018	August 2018	September 2018	January - September YTD 2018	2017	% Change
	Kg	**71,307**	**103,069**	**98,686**	**76,898**	**97,665**	**127,445**	**889,024**	**580,075**	**53.3%**
	Value ($Cdn)	**1,356,601**	**1,756,502**	**1,698,109**	**1,401,834**	**1,497,677**	**1,698,880**	**13,573,040**	**8,819,511**	**53.9%**

**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 2017	487.27	466.26	402.50	438.24
Nov 2017	481.14	467.92	422.50	411.71
Dec 2017	481.16	471.95	419.47	413.30
Jan 2018	483.98	470.59	434.80	416.01
Feb 2018	486.73	471.49	417.41	400.43
Mar 2018	482.80	479.99	409.63	397.03
Apr 2018	492.86	471.57	398.08	414.52
May 2018	489.88	468.65	409.47	401.40
June 2018	489.69	471.90	411.00	391.22
July 2018	485.10	479.08	409.58	397.52
Aug 2018	482.59	476.64	414.90	394.15
Sept 2018	487.11	479.72	401.67	425.25
Oct 2018	479.69	464.02	408.68	405.13

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
Nov 2017	600-625	575-625	500-550	500-550
Dec 2017	550-600	550-600	450-525	450-525
Jan 2018	550-600	550-600	450-525	450-525
Feb 2018	550-600	550-600	450-525	450-525
Mar 2018	550-600	550-600	450-500	450-500
Apr 2018	575-600	575-600	460-500	460-500
May 2018	580-600	580-600	460-490	460-490
June 2018	575-600	575-600	460-500	460-500
July 2018	575-600	575-600	460-500	460-500
Aug 2018	575-600	575-600	425-470	425-470
Sept 2018	575-600	575-600	425-470	425-470
Oct 2018	575-600	575-600	425-460	425-460
Nov 2018	575-600	555-580	400-450	400-450

**source CBA survey of marketers*

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

	August 2018		September 2018		October 2018		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1300-1857	1394.15	1300-1858	1374.53	1200-1575	1308.97	-6.1%	-4.8%
Chuckroll/Clod Fresh	620-875	692.01	620-885	694.10	620-800	686.20	-0.8%	-1.1%
Striploin Fresh	920-1550	1214.03	979-1550	1165.73	950-1450	1150.28	-5.3%	-1.3%
Tenderloin Fresh	1700-2908	2103.54	1800-2964	2108.54	1700-2400	1957.10	-7.0%	-7.2%
Ground 90% Bulk, Fresh	600-750	638.00	600-750	638.00	600-750	629.00	-1.4%	-1.4%
Ground 85% Bulk, Frozen	700-1073	763.05	700-1096	785.59	743-743	743	-2.6%	-5.4%
Ground 85% Patties, Frozen	655-1008	758.99	646-973	780.51	766-766	766.00	0.9%	-1.9%

**source USDA*

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

	Mid-August 2018 Pricing	Mid-September 2018 Pricing	Mid-October 2018 Pricing	Mid-November 2018 Pricing
Tenderloin - Fresh	$46.00 - $59.95	$46.00 - $59.95	$56.00 - 59.95	$56.00 - $59.95
Strip Loin Boneless - Fresh	$33.00 - $36.95	$33.00 - $36.95	$33.00 - $35.95	$33.00 - $35.95
Inside Round - Fresh	$21.00 - $21.95	$21.00 - $21.95	$21.00 - $22.50	$21.00 - $22.50
Ground 90% Bulk Fresh	$20.95 - $23.93	$20.95 - $23.93	$18.95 - $20.95	$18.95 - $20.95
Fresh Bison Trim	$16.95 - $19.00	$16.95 - $19.95	$16.95 - $18.95	$16.95 - $18.95

**source CBA survey of marketers*

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

Vold, Jones & Vold Auction Co. Ltd. (AB) (Mar 17, 2018)
Head Sold: 479

Calves	Bulls	Heifers
500 lbs +	$4.00 - $4.60	$3.00 - $3.65
400 - 499 lbs	$4.00 - $4.80	$3.20 - $3.80
300 - 399 lbs	$4.40 - $5.05	$3.30 - $4.05
Under 300 lbs	$4.55 - $4.70	$3.95 - $4.55
Yearlings	**Bulls**	**Heifers**
700 - 799 lbs	$3.00 - $3.40	$3.00 - $3.25
600 - 699 lbs	$3.00 - $3.20	$3.00 - $3.25
500 - 599 lbs	$3.00 - $3.50	$3.00 - $3.25
400 - 499 lbs	$3.15 - $3.80	$3.00 - $3.50
Under 400 lbs	$3.25 - $4.00	$3.00 - $3.80
Other		
Mature Bulls (1250 lbs +)		$1.75 - $2.05
Mature Cows (950 lbs +)		— - $2.05

Vold, Jones & Vold Auction Co. Ltd. (AB) (January 27, 2018)
Head Sold: 420

Calves		Bulls	Heifers
500 lbs +		$4.00 - $4.35	
400 - 499 lbs		$4.90 - $5.25	$3.80 - $4.20
300 - 399 lbs		$4.90 - $5.35	$3.90 - $4.55
Under 300 lbs		$4.30 - $5.00	$3.90 - $4.50
Yearlings		**Bulls**	**Heifers**
700 - 799 lbs		$3.00 - $3.45	$3.00 - $3.35
600 - 699 lbs		$3.50 - $3.90	$3.00 - $3.40
500 - 599 lbs			$3.00 - $3.45
400 - 499 lbs			$3.00 - $3.20
Other			
Mature Bulls	1250 lbs +	$1.80 - $2.00	
	950 - 1249 lbs	$1.90 - $2.25	
Mature Cows	950 lbs +	$2.00 - $2.17	
	700 - 949 lbs	$1.75 - $2.20	
Younger Cows	700 - 949 lbs	$2.00 - $2.35	
Younger Breds		$3,850.00 - $4,300.00	
Older Bred		$3,000.00 - $3,500.00	

Vold, Jones & Vold Auction Co. Ltd. (AB) (November 18, 2017)
Head Sold: 174

Calves	Bulls	Heifers
500 lbs +		
400 - 499 lbs	$550.00 - $660.00	$400.00 - $500.00
300 - 399 lbs	$500.00 - $640.00	$425.00 - $545.00
Under 300 lbs	$425.00 - $625.00	$400.00 - $520.00
Yearlings	**Bulls**	**Heifers**
700 - 799 lbs	$300.00 - $430.00	$300.00 - $395.00
600 - 699 lbs	$325.00 - $475.00	$300.00 - $360.00
500 - 599 lbs	$325.00 - $472.50	$300.00 - $370.00
400 - 499 lbs	$340.00 - $480.00	$300.00 - $397.50
Under 400 lbs	$375.00 - $495.00	
Mature Cows		
950 lbs +		— - $260.00
700 - 949 lbs		— - $250.00
Younger Breds		— - $2,900.00

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 canadianbison@sasktel.net or stefan.schneider@canada.ca

Prices offered to producers to mid-November were softer with most sales at $5.75 per pound HHW for Grade "A" bulls. . The occasional sale was reported as high as $6.00 per pound HHW for Grade "A" bulls. U.S. buyers are offering prices that equate to as high as $6.00 Canadian with returns dependent on quality, transport incentives and export costs. Canadian buyers are paying up to $5.55 - $5.80 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 2018 reached 6,041 head – down 7.8% from the 6,552 animals slaughtered for the same period in 2017. Live animal exports to the US for the first nine months in 2018 totalled 14,611 head – down 8.0% from the 15,927 head exported in 2017.

Marketers report that although the demand for bison trim is steady, trim inventory is burdensome. The demand tenderloins continues to be strong with a steady demand for rib-eyes and a weaker demand for striploins and top sirloins. US demand continues to be steady. With the Comprehensive Economic Trade Agreement with the European Union in effect since September 21, 2017, European demand continues to adjust to the CETA agreement with Brexit create some uncertainty in Europe.
Canadian demand is stable. The Canadian marketers indicate that present supplies of finished bison continue to be more than adequate for the next six months.

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

Chart 1

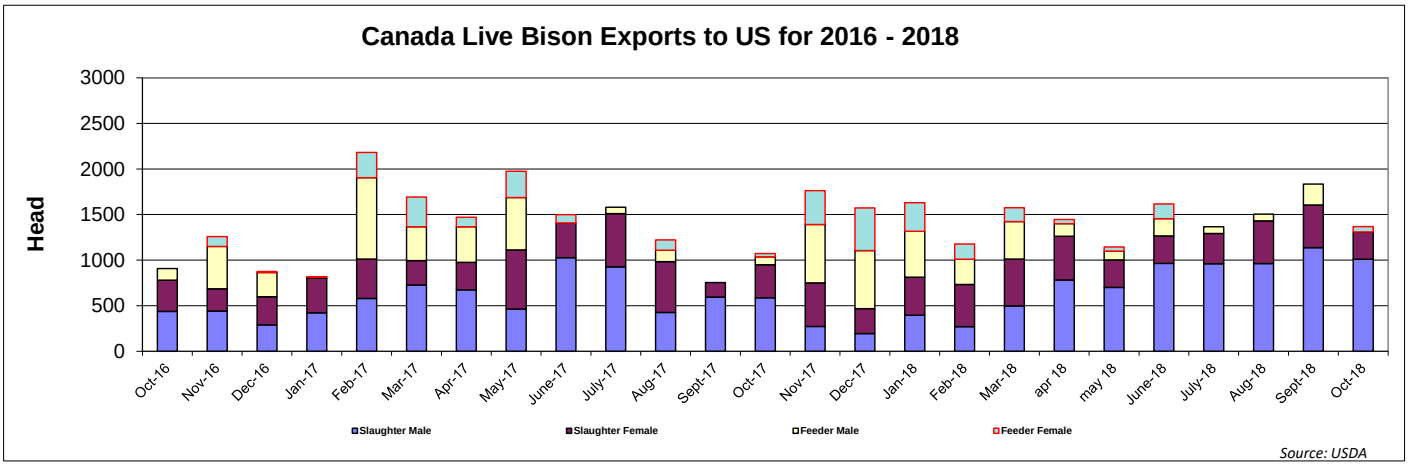
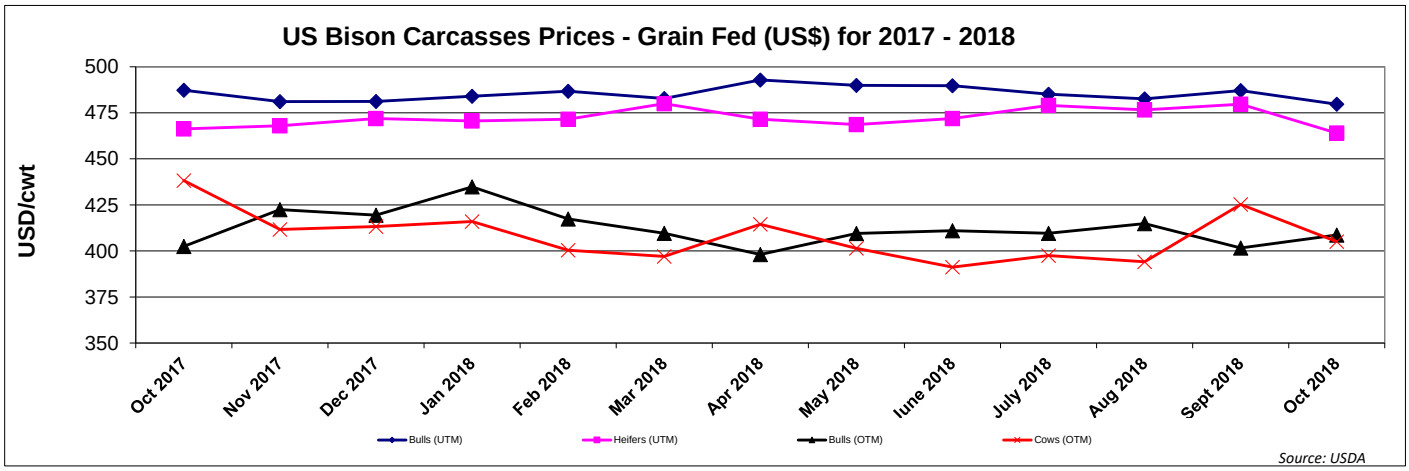


Chart 2



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%
Canada Total	**975**	**1,211**	**1,898**	-19.5%	**119,314**	**125,142**	**195,728**	-4.7%

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

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