Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - July 31, 2019.

Weekly Federal Bison Slaughter

	1-Jun	8-Jun	15-Jun	22-Jun	29-Jun	June Total	January - June YTD 2019	2018	% Change
Total Canada	*48*	*218*	*99*	*272*	46	**683**	**4,226**	**4,729**	**-10.6%**
previous year	*284*	*88*	*183*	*93*	*311*	***959***			

Provincially Inspected Slaughter

	January 2019	February 2019	March 2019	April 2019	May 2019	May 2018	January - May YTD 2019	2018	% Change
Alberta	45	31	61	47	51	58	235	269	-12.6%
Saskatchewan	9	10	12	19	13	11	63	46	37.0%
Manitoba/BC	40	38	28	14	17	31	137	150	-8.7%
Ontario/Quebec	29	19	33	22	28	46	131	129	1.6%
Total	**123**	**98**	**134**	**102**	**109**	**146**	**566**	**594**	**-4.7%**

	YTD 2019	YTD 2018	% Change
Total Canadian Federal and Provincial Slaughter *	**4,792**	**5,323**	**-10.0%**

**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

	2013	2014	2015	2016	2017	2018	January - May YTD 2019	2018	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	10,013	4,109	4,364	**-5.8%**
Total Live Exports	16,769	19,033	26,162	18,364	17,600	17,342	10,377	6,969	**48.9%**
Total Production	**31,157**	**33,404**	**40,348**	**29,932**	**28,486**	**27,316**	**14,486**	**11,333**	**27.8%**

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

US Federal Slaughter*

for week ending:	1-Jun	8-Jun	15-Jun	22-Jun	29-Jun	June Total	January - June YTD 2019	2018	% Change
	925	**1,093**	**1,081**	**1,142**	**1,233**	**5,474**	**27,198**	**26,011**	**4.6%**
previous year	*849*	*1,182*	*1,231*	*1,136*	*1,229*	***5,627***			

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

Canada Live Bison Exports to US

	February - 19	March - 19	April - 19	May - 19	June - 19	January - June YTD 2019	2018	% Change
Slaughter Male	648	761	994	896	736	4,735	3,612	**31.1%**
Slaughter Female	177	608	494	342	562	2,530	2,475	**2.2%**
Feeder Male	500	221	711	728	252	3,077	1,617	**90.3%**
Feeder Female	139	230	721	217	131	1,716	881	**94.8%**
Total	**1,464**	**1,820**	**2,920**	**2,183**	**1,681**	**12,058**	**8,585**	**40.5%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		December 2018	January 2019	February 2019	March 2019	April 2019	May 2019	January - May YTD 2019	2018	% Change
USA	Kg	22,070	65,489	110,089	57,277	43,163	28,411	**304,429**	**184,778**	**64.8%**
	Value ($Cdn)	325,605	912,749	1,760,917	1,125,887	844,157	552,686	**5,196,396**	**3,608,781**	**44.0%**
France	Kg	4,749	3,699	5,363	6,135	2,285	531	**18,013**	**43,989**	**-59.1%**
	Value ($Cdn)	163,422	110,811	153,875	214,183	83,686	23,375	**585,930**	**1,154,444**	**-49.2%**
Switzerland	Kg	5,056	2,154	5,954	17,420	1,509	1,191	**28,228**	**31,392**	**-10.1%**
	Value ($Cdn)	160,462	61,269	129,292	342,285	44,721	54,900	**632,467**	**945,838**	**-33.1%**
Netherlands	Kg	1,580	-	495	1,157	453	974	**3,079**	**2,168**	**42.0%**
	Value ($Cdn)	17,293	-	14,122	52,484	12,914	28,661	**108,181**	**80,984**	**33.6%**
Mexico	Kg	-	-	-	9,822	20,456	-	**30,278**	**-**	**N/A**
	Value ($Cdn)	-	-	-	73,534	176,729	-	**250,263**	**-**	**N/A**
United Kingdom	Kg	52,032	17,864	36,440	36,469	18,171	23,160	**132,104**	**23,039**	**473.4%**
	Value ($Cdn)	510,221	172,642	372,716	369,677	195,571	237,020	**1,347,626**	**213,037**	**532.6%**
Saint Pierre and Miquelon	Kg	2,238	5,190	4,564	4,100	6,805	5,703	**26,362**	**20,661**	**27.6%**
	Value ($Cdn)	23,177	45,501	41,964	41,125	74,605	52,927	**256,122**	**182,284**	**40.5%**
Other Countries	Kg	5,781	3,415	-	-	13,385	4,538	**21,338**	**-**	**N/A**
	Value ($Cdn)	160,450	74,416	-	-	211,615	143,061	**429,092**	**-**	**N/A**
Total	**Kg**	**93,506**	**97,811**	**162,905**	**132,380**	**106,227**	**64,508**	**563,831**	**306,027**	**84.2%**
	Value ($Cdn)	**1,360,630**	**1,377,388**	**2,472,886**	**2,219,175**	**1,643,998**	**1,092,630**	**8,806,077**	**6,185,368**	**42.4%**

Bone-in		December 2018	January 2019	February 2019	March 2019	April 2019	May 2019	January - May YTD 2019	2018	% Change
Total	**Kg**	**16,235**	**17,191**	**6,745**	**6,743**	**8,731**	**15,629**	**55,039**	**182,303**	**-69.8%**
	Value ($Cdn)	**235,418**	**251,474**	**51,962**	**49,380**	**73,989**	**140,042**	**566,847**	**1,091,172**	**-48.1%**

Total Exports, Boneless and Bone-in		December 2018	January 2019	February 2019	March 2019	April 2019	May 2019	January - May YTD 2019	2018	% Change
	Kg	**109,741**	**115,002**	**169,650**	**139,123**	**114,958**	**80,137**	**618,870**	**488,330**	**26.7%**
	Value ($Cdn)	**1,596,048**	**1,628,862**	**2,524,848**	**2,268,555**	**1,717,987**	**1,232,672**	**9,372,924**	**7,276,540**	**28.8%**

**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)
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
Nov 2018	486.60	469.44	400.74	395.74
Dec 2018	484.50	477.56	410.18	389.25
Jan 2019	453.49	456.39	403.36	376.26
Feb 2019	453.07	437.69	370.56	371.35
Mar 2019	464.80	423.39	407.71	373.54
Apr 2019	449.75	428.79	399.83	376.66
May 2019	449.32	432.90	395.10	356.30
June 2019	448.11	445.93	398.50	347.59

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Dec 2018	560-575	550-565	400-450	400-450
Jan 2019	550-570	530-550	400-450	400-450
Feb 2019	530-560	510-530	400-450	400-450
Mar 2019	530-560	510-530	400-450	400-450
Apr 2019	520-550	500-520	400-450	375-450
May 2019	500-530	490-510	375-400	375-400
June 2019	500-520	480-500	375-400	375-400
July 2019	495-510	480-500	375-400	375-400

**source CBA survey of marketers*

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

	April 2019		May 2019		June 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,413 - 1,895	1,633.84	1,194 - 1,900	1,567.42	1,050-1,887	1,359.69	-16.8%	-13.3%
Chuckroll/Clod Fresh	690 - 875	721.13	685 - 723	718.83	685-727	721.01	0.0%	0.3%
Striploin Fresh	850 - 1,878	1,423.59	815 - 1,879	1,396.55	920-1,885	1,386.36	-2.6%	-0.7%
Tenderloin Fresh	2,099 - 2,533	2263.49	2,070 - 2,573	2251.76	2,059-2,561	2257.78	-0.3%	0.3%
Grnd 85% Bulk, Frozen	600 - 796	705.64	595 - 797	689.69	595-787	653.71	-7.4%	-5.2%
Grnd 85% Patties, Fresh	650 - 779	695.66	764 - 818	774.03	765-818	773.06	11.1%	-0.1%
Grnd 85% Patties, Frozen	610 - 793	685.94	610 - 784	692.62	610-794	674.72	-1.6%	-2.6%

**source USDA*

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

	Mid-April 2019 Pricing	Mid-May 2019 Pricing	Mid-June 2019 Pricing	Mid-July 2019 Pricing
Tenderloin - Fresh	$51.00 - $64.95	$51.00 - $55.00	$52.00 - $62.95	$52.00 - $57.00
Strip Loin Boneless - Fresh	$30.95 - $36.00	$33.00 - $36.00	$32.95 - $36.00	$32.95 - $36.00
Inside Round - Fresh	$17.95 - $21.00	$18.95 - $21.40	$18.45 - $21.40	$18.45 - $20.00
Ground 90% Bulk Fresh	$16.95 - $18.95	$16.95 - $18.95	$16.95 - $18.95	$16.95 - $18.95
Fresh Bison Trim	$14.50 - $17.50	$14.50 - $16.50	$13.45 - $16.50	$13.45 - $16.50

**source CBA survey of marketers*

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

Vold, Jones & Vold Auction Co. Ltd. (AB) (November 17, 2018)
Head Sold: 189

Calves	Bulls	Heifers
500 lbs +		
400 - 499 lbs	$380.00 - $435.00	$350.00 - $390.00
300 - 399 lbs	$380.00 - $435.01	$350.00 - $390.01
Under 300 lbs		
Yearlings	**Bulls**	**Heifers**
700 - 799 lbs	$250.00 - $300.00	$250.00 - $280.00
600 - 699 lbs	$250.00 - $300.00	$250.00 - $280.00
500 - 599 lbs	$270.00 - $330.00	$270.00 - $315.00
400 - 499 lbs	$270.00 - $330.00	$270.00 - $315.00
Under 400 lbs		
Mature Bulls		
1250 lbs +		— - $180.00
950 - 1249 lbs		$180.00 - $200.00
Younger Breds		$2,600 - $2,650
Older Breds		$1,700 - $2,000
Younger Pairs		— - $2,800.00

Vold, Jones & Vold Auction Co. Ltd. (AB) (January 19, 2019)
Head Sold: 372

Calves	Bulls	Heifers
500 lbs +	$300.00 - $380.00	$220.00 - $310.00
400 - 499 lbs	$360.00 - $410.00	$270.00 - $310.00
300 - 399 lbs	$360.00 - $400.00	$270.00 - $325.00
Under 300 lbs	$315.00 - $340.00	$240.00 - $260.00
Yearlings	**Bulls**	**Heifers**
700 - 799 lbs	$270.00 - $305.00	$230.00 - $250.00
600 - 699 lbs	$300.00 - $330.00	$220.00 - $270.00
500 - 599 lbs	$300.00 - $380.00	$200.00 - $250.00
400 - 499 lbs	$290.00 - $310.00	$200.00 - $310.00
Under 400 lbs		
Mature Cows		
1250 lbs+		$165.00 - $195.00
950 - 1249 lbs		$165.00 - $195.01
Mature Cows		
750 - 949 lbs		$165 - $215
Older Bred		$1600 - $1900

Vold, Jones & Vold Auction Co. Ltd. (AB) (March 16, 2019)
Head Sold: 189

Calves	Bulls	Heifers
500 lbs +	$305.00 - $340.00	$275.00 - $325.00
400 - 499 lbs	$310.00 - $380.00	$320.00 - $335.00
300 - 399 lbs	$300.00 - $370.00	$260.00 - $305.00
Under 300 lbs	$275.00 - $305.00	$200.00 - $265.00
Yearlings	**Bulls**	**Heifers**
700 - 799 lbs	$305.00 - $300.00	
600 - 699 lbs	$310.00 - $330.00	$240.00 - $265.00
500 - 599 lbs	$170.00 - $330.00	$160.00 - $275.00
400 - 499 lbs	$215.00 - $355.00	$175.00 - $265.00
Under 400 lbs		$175.00 - $260.00
Mature Bulls		
1250 lbs +		$195.00 - $2200.00
Younger Cows		
700 - 949 lbs		— - $180.00

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 in mid-July 2019 for finished bison were slightly lower than June prices. Most new sales were at $4.90 - $5.10 per pound HHW for grade "A" bulls with some previously contracted prices as high as $5.60/lb HHW. U.S. buyers are offering prices that equate to $5.50 Canadian per pound HHW with returns dependent on quality and export costs. Canadian buyers are paying up to $4.80 - $5.00 per pound HHW for Grade "A" heifers. U.S. buyers are offering prices that equate to Canadian prices with returns dependent on quality, exchange rates, and export costs.

Nationally, federal slaughter in Canada for the first 30 weeks of 2019 (week ending July 27, 2019) reached 4,828 head – down 9.0% from the 5,304 animals slaughtered in 2018 during the same period. Live animal exports to the US during the first six months of 2019 totaled 12,058 head – up 40.5% when compared to the 8,585 bison exported throughout the first half of 2018. Average prices for the first five months in 2019 were 13.0% lower than the same period in 2018.

Marketers report that the demand for bison trim has improved for the summer BBQ season. The demand for tenderloins and rib-eyes is steady, while the demand for striploins continues to be slow. US demand continues to be steady. With the Comprehensive Economic Trade Agreement with the European Union in effect since September 21, 2017, demand for bison is increasing with reports of increased interest from protein meat importers. North American demand has increased, with this demand being driven, to a great extent, by the grilling season and lower prices. Canadian demand has shown some increase over the summer.

Canadian marketers indicate that present supplies of finished bison continue to be more than adequate for the next six months. Improved pasture conditions because of recent rains is expected to allow producers to retain animals they may have previously planned on marketing.

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

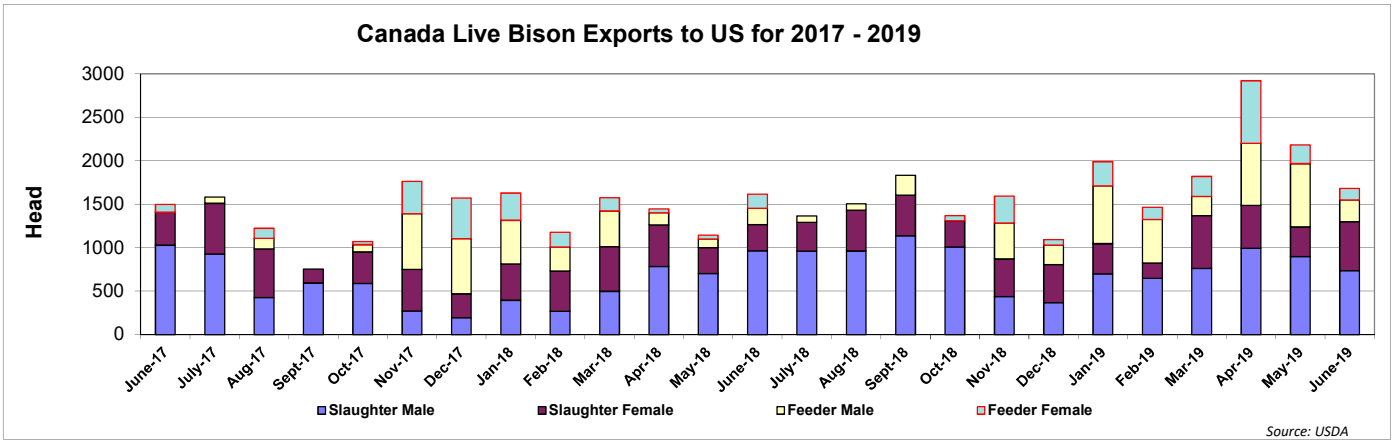
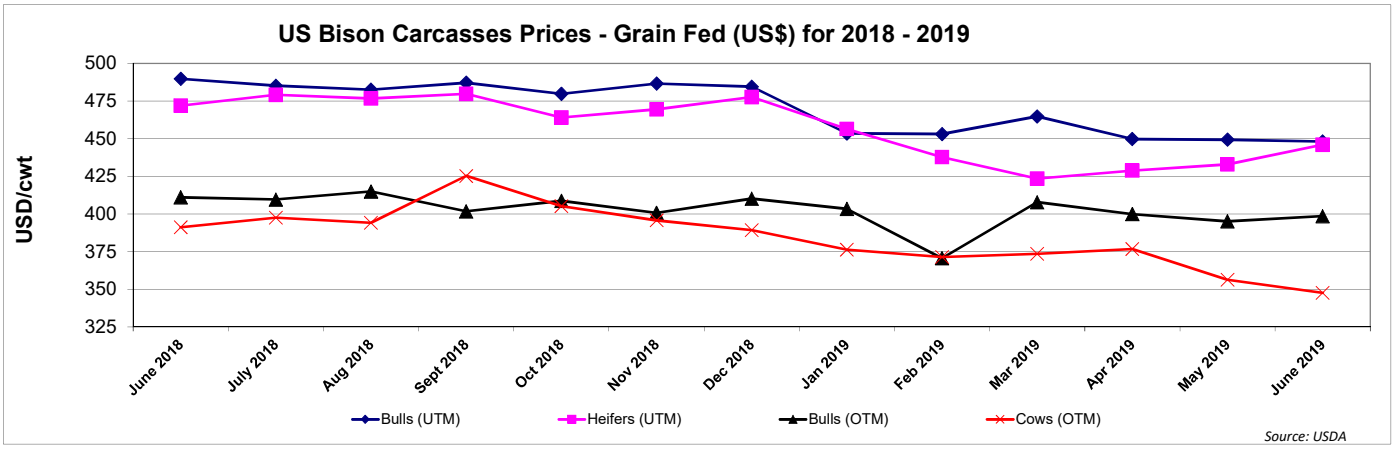


Chart 2



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

Prepared by: Red Meat Section, Agriculture and Agri-Food Canada

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