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BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - September 23, 2019.

Weekly Federal Bison Slaughter

	3-Aug	10-Aug	17-Aug	24-Aug	August Total	January - August YTD 2019	2018	% Change
Total Canada	*196*	*50*	*248*	*3*	**497**	**5,325**	**5,939**	**-10.3%**
previous year	*77*	*318*	*1*	*239*	***635***			

Provincially Inspected Slaughter

	March 2019	April 2019	May 2019	June 2019	July 2019	July 2018	January - July YTD 2019	2018	% Change
Alberta	61	47	51	38	61	50	334	390	-14.4%
Saskatchewan	12	19	13	12	11	8	86	57	50.9%
Manitoba/BC	28	14	17	28	43	29	208	207	0.5%
Ontario/Quebec	33	22	28	44	42	47	217	215	0.9%
Total	**134**	**102**	**109**	**122**	**157**	**134**	**845**	**869**	**-2.8%**

	YTD 2019	YTD 2018	% Change
Total Canadian Federal and Provincial Slaughter *	**6,170**	**6,808**	**-9.4%**

**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 - July YTD 2019	2018	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	10,013	5,673	6,173	**-8.1%**
Total Live Exports	16,769	19,033	26,162	18,364	17,600	17,342	14,401	9,951	**44.7%**
Total Production	**31,157**	**33,404**	**40,348**	**29,932**	**28,486**	**27,316**	**20,074**	**16,124**	**24.5%**

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

US Federal Slaughter*

for week ending:	3-Aug	10-Aug	17-Aug	24-Aug	August Total	January - August YTD 2019	2018	% Change
	1,017	**973**	**1,016**	**1,098**	**4,104**	**35,295**	**34,057**	**3.6%**
previous year	*1,076*	*944*	*942*	*862*	***3,824***			

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

Canada Live Bison Exports to US

	April - 19	May - 19	June - 19	July - 19	August - 19	January - August YTD 2019	2018	% Change
Slaughter Male	994	896	736	1275	364	6,374	5,536	**15.1%**
Slaughter Female	494	342	562	528	666	3,724	3,275	**13.7%**
Feeder Male	711	728	252	357	75	3,509	1,763	**99.0%**
Feeder Female	721	217	131	183	0	1,899	881	**115.6%**
Total	**2,920**	**2,183**	**1,681**	**2,343**	**1,105**	**15,506**	**11,455**	**35.4%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	January - July YTD 2019	2018	% Change
USA	Kg	110,089	57,277	43,163	28,411	49,682	39,886	**393,997**	**255,186**	**54.4%**
	Value ($Cdn)	1,760,917	1,125,887	844,157	552,686	704,144	683,163	**6,583,703**	**4,919,468**	**33.8%**
France	Kg	5,363	6,135	2,285	531	3,675	10,263	**31,951**	**50,081**	**-36.2%**
	Value ($Cdn)	153,875	214,183	83,686	23,375	119,492	329,828	**1,035,250**	**1,356,966**	**-23.7%**
Switzerland	Kg	5,954	17,420	1,509	1,191	1,818	881	**30,927**	**40,381**	**-23.4%**
	Value ($Cdn)	129,292	342,285	44,721	54,900	75,319	40,489	**748,275**	**1,300,563**	**-42.5%**
Netherlands	Kg	495	1,157	453	974	-	355	**3,434**	**2,341**	**46.7%**
	Value ($Cdn)	14,122	52,484	12,914	28,661	-	11,983	**120,164**	**89,404**	**34.4%**
Mexico	Kg	-	9,822	20,456	-	14,259	-	**44,537**	**-**	**N/A**
	Value ($Cdn)	-	73,534	176,729	-	101,866	-	**352,129**	**-**	**N/A**
United Kingdom	Kg	36,440	36,469	18,171	23,160	21,350	-	**153,454**	**23,039**	**566.1%**
	Value ($Cdn)	372,716	369,677	195,571	237,020	222,101	-	**1,569,727**	**213,037**	**636.8%**
Saint Pierre and Miquelon	Kg	4,564	4,100	6,805	5,703	5,353	-	**31,715**	**30,908**	**2.6%**
	Value ($Cdn)	41,964	41,125	74,605	52,927	46,429	-	**302,551**	**276,794**	**9.3%**
Other Countries	Kg	-	-	13,385	4,538	2,105	954	**24,397**	**-**	**N/A**
	Value ($Cdn)	-	-	211,615	143,061	15,417	43,672	**488,181**	**-**	**N/A**
Total	**Kg**	**162,905**	**132,380**	**106,227**	**64,508**	**98,242**	**52,339**	**714,412**	**401,936**	**77.7%**
	Value ($Cdn)	**2,472,886**	**2,219,175**	**1,643,998**	**1,092,630**	**1,284,768**	**1,109,135**	**11,199,980**	**8,156,232**	**37.3%**

Bone-in		February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	January - July YTD 2019	2018	% Change
Total	**Kg**	**6,745**	**6,743**	**8,731**	**15,629**	**5,697**	**5,702**	**66,438**	**261,978**	**-74.6%**
	Value ($Cdn)	**51,962**	**49,380**	**73,989**	**140,042**	**38,892**	**38,625**	**644,364**	**2,220,251**	**-71.0%**

Total Exports, Boneless and Bone-in		February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	January - July YTD 2019	2018	% Change
	Kg	**169,650**	**139,123**	**114,958**	**80,137**	**103,939**	**58,041**	**780,850**	**663,914**	**17.6%**
	Value ($Cdn)	**2,524,848**	**2,268,555**	**1,717,987**	**1,232,672**	**1,323,660**	**1,147,760**	**11,844,344**	**10,376,483**	**14.1%**

**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)
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
July 2019	444.15	442.50	391.49	351.55
Aug 2019	418.75	422.05	317.69	348.72

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Aug 2019	495-510	480-500	350-380	350-380
Sept 2019	485-500	470-490	350-375	350-375

**source CBA survey of marketers*

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

	June 2019		July 2019		August 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,050-1,887	1,359.69	1,230 - 1,887	1,579.66	1,298-1,881	1,571.36	15.6%	-0.5%
Chuckroll/Clod Fresh	685-727	721.01	690 - 875	736.54	680-720	717.16	-0.5%	-2.6%
Striploin Fresh	920-1,885	1,386.36	920 - 1,875	1,309.93	1,077-1,874	1,319.14	-4.8%	0.7%
Tenderloin Fresh	2,059-2,561	2257.78	1,995 - 2,590	2,235.68	2,060-2,557	2,295.43	1.7%	2.7%
Grnd 85% Bulk, Frozen	595-787	653.71	635 - 979	792.00	590-774	658.26	0.7%	-16.9%
Grnd 85% Patties, Fresh	765-818	773.06	N/A	N/A	N/A	N/A	-	-
Grnd 85% Patties, Frozen	610-794	674.72	595 - 787	651.07	600-785	685.02	1.5%	5.2%

**source USDA*

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

	Mid-June 2019 Pricing	Mid-July 2019 Pricing	Mid-August 2019 Pricing	Mid-September 2019 Pricing
Tenderloin - Fresh	$52.00 - $62.95	$52.00 - $57.00	$50.00 - $52.00	$50.00 - $55.00
Strip Loin Boneless - Fresh	$32.95 - $36.00	$32.95 - $36.00	$32.95 - $34.00	$32.95 - $36.00
Inside Round - Fresh	$18.45 - $21.40	$18.45 - $20.00	$18.45 - $20.00	$19.40 - $19.00
Ground 90% Bulk Fresh	$16.95 - $18.95	$16.95 - $18.95	$16.95 - $18.95	N/A
Fresh Bison Trim	$13.45 - $16.50	$13.45 - $16.50	$11.95 - $15.00	$11.95 - $15.00

**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 to mid-September 2019 for finished bison were comparable to August prices. Most offers were at $4.85 - $5.00 per pound HHW for grade "A" bulls with no shortage of supply. U.S. buyers are offering prices that equate to $5.00 Canadian per pound HHW with returns dependent on quality and export costs. Canadian buyers are paying up to $4.70 - $4.90 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 37 weeks of 2019 (week ending September 14) reached 5,808 head – down 6.3% from the 6,197 animals slaughtered in 2018 during the same period. Live animal exports to the US for the first eight months of 2019 totaled 15,506 head – up 35.4% when compared to the 11,455 bison exported during the same time period in 2018. Average prices of animals exported for the first seven months in 2019 were 11.0% lower than the same period in 2018.

Marketers report that the demand for bison trim has been steady with the summer BBQ season. The demand for tenderloins and rib-eyes is strong, 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.

The 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, are 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

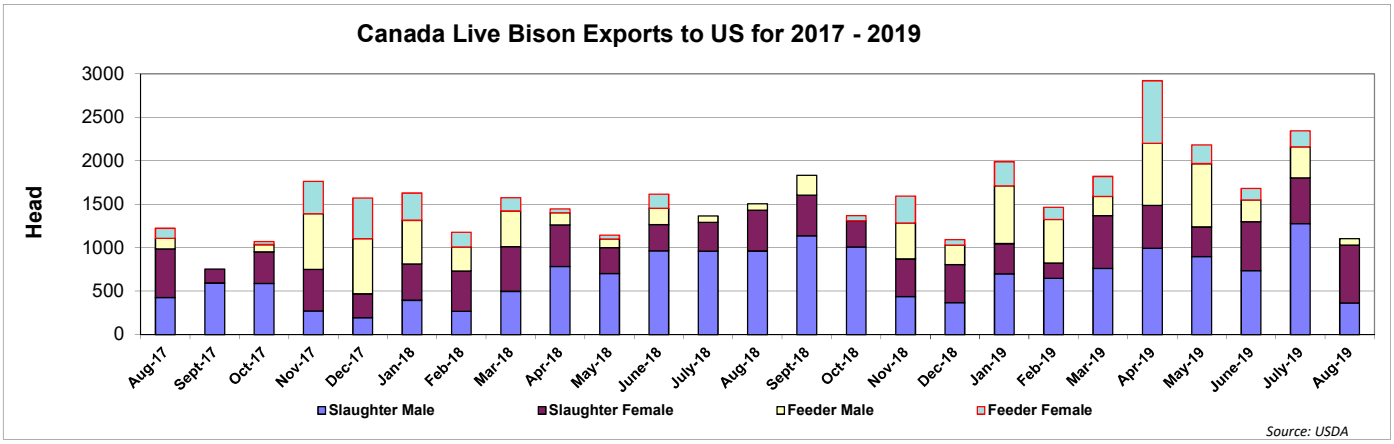
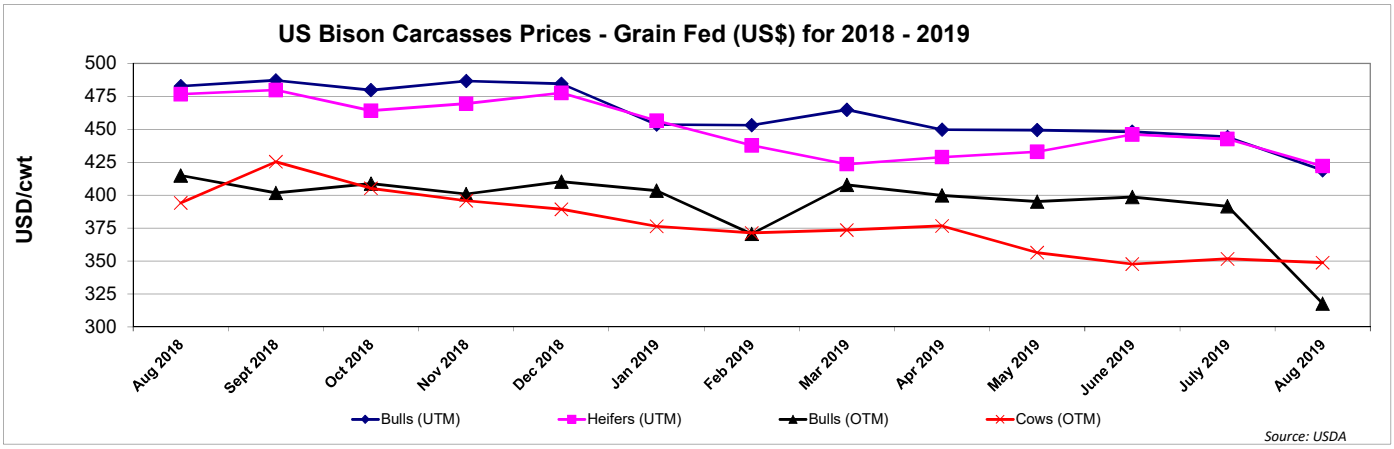


Chart 2



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

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