



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - October 30, 2019.

Weekly Federal Bison Slaughter

	31-Aug	7-Sep	14-Sep	21-Sep	28-Sep	September Total	January - September YTD		
	2019	2018					2019	2018	% Change
Total Canada	218	53	212	2	277	762	6,087	6,435	-5.4%
previous year	3	215	40	214	24	496			

Provincially Inspected Slaughter

	April 2019	May 2019	June 2019	July 2019	August 2019	August 2018	January - August YTD		
	2019	2018					2019	2018	% Change
Alberta	47	51	38	61	42	47	376	437	-14.0%
Saskatchewan	19	13	12	11	22	7	108	64	68.8%
Manitoba/BC	14	17	28	43	24	13	232	220	5.5%
Ontario/Quebec	22	28	44	42	39	37	256	252	1.6%
Total	102	109	122	157	127	104	972	973	-0.1%

Total Canadian Federal and Provincial Slaughter *	YTD 2019	YTD 2018	% Change
	7,059	7,408	-4.7%

*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

	2013	2014	2015	2016	2017	2018	January - August YTD		
	2019	2018					2019	2018	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	10,013	6,297	6,912	-8.9%
Total Live Exports	16,769	19,033	26,162	18,364	17,600	17,342	15,506	11,455	35.4%
Total Production	31,157	33,404	40,348	29,932	28,486	27,316	21,803	18,367	18.7%

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

US Federal Slaughter*

for week ending:	31-Aug	7-Sep	14-Sep	21-Sep	28-Sep	September Total	January - September YTD		
	2019	2018					2019	2018	% Change
	1,150	872	987	1,044	1,179	5,232	40,527	38,544	5.1%
previous year	1,005	796	982	841	863	4,487			

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

Canada Live Bison Exports to US

	May - 19	June - 19	July - 19	August - 19	September - 19	January - September YTD		
	2019	2018				2019	2018	% Change
Slaughter Male	896	736	1275	364	576	6,950	6,672	4.2%
Slaughter Female	342	562	528	666	494	4,218	3,744	12.7%
Feeder Male	728	252	357	75	0	3,509	1,992	76.2%
Feeder Female	217	131	183	0	0	1,899	881	115.6%
Total	2,183	1,681	2,343	1,105	1,070	16,576	13,289	24.7%

*source : USDA, APHIS

Canadian Fresh or Chilled Bison Meat Exports

								January - August YTD		
								2019	2018	% Change
Boneless										
United States	Kg	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	2019	2018	% Change
	Value (\$Cdn)	57,277	43,163	28,411	49,682	39,886	25,247	419,244	278,855	50.3%
France	Kg	1,125,887	844,157	552,686	704,144	683,163	400,034	6,983,737	5,445,145	28.3%
	Value (\$Cdn)	6,135	2,285	531	3,675	10,263	169	32,120	53,601	-40.1%
Switzerland	Kg	214,183	83,686	23,375	119,492	329,828	7,567	1,042,817	1,449,107	-28.0%
	Value (\$Cdn)	17,420	1,509	1,191	1,818	881	1,933	32,860	44,866	-26.8%
Saint Pierre and Miquelon	Kg	342,285	44,721	54,900	75,319	40,489	72,097	820,372	1,447,917	-43.3%
	Value (\$Cdn)	4,100	6,805	5,703	5,353	-	4,708	36,423	36,167	0.7%
Germany	Kg	41,125	74,605	52,927	46,429	-	48,229	350,780	325,929	7.6%
	Value (\$Cdn)	36,469	18,171	23,160	21,350	-	-	153,454	32,168	377.0%
Mexico	Kg	369,677	195,571	237,020	222,101	-	-	1,569,727	302,618	418.7%
	Value (\$Cdn)	9,822	20,456	-	14,259	-	-	44,537	29,696	50.0%
Netherlands	Kg	73,534	176,729	-	101,866	-	-	352,129	299,317	17.6%
	Value (\$Cdn)	1,157	453	974	-	355	1,150	4,584	2,497	83.6%
Other Countries	Kg	52,484	12,914	28,661	-	11,983	25,853	146,017	93,857	55.6%
	Value (\$Cdn)	-	13,385	4,538	2,105	954	1,078	25,475	487	5131.0%
Total	Kg	-	211,615	143,061	15,417	43,672	34,551	522,732	5,626	9191.4%
	Value (\$Cdn)	132,380	106,227	64,508	98,242	52,339	34,285	748,697	478,337	56.5%
								2,219,175	1,643,998	25.8%

Bone-in

	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	January - August YTD		
	2019	2018					2019	2018	% Change
Total	6,743	8,731	15,629	5,697	5,702	18,517	84,955	301,826	-71.9%
	49,380	73,989	140,042	38,892	38,625	117,148	761,512	2,798,011	-72.8%

Total Exports, Boneless and Bone-in

	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	January - August YTD		
	2019	2018					2019	2018	% Change
Kg	139,123	114,958	80,137	103,939	58,041	52,802	833,652	780,163	6.9%
Value (\$Cdn)	2,268,555	1,717,987	1,232,672	1,323,660	1,147,760	705,479	12,549,823	12,167,527	3.1%

*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)
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
Sept 2019	431.53	418.72	348.11	352.59

*source USDA

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Oct 2019	480-500	470-490	350-380	350-380

*source CBA survey of marketers

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

	July 2019		August 2019		September 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,230 - 1,887	1,579.66	1,298-1,881	1,571.36	1,401-1,882	1,753.17	11.0%	11.6%
Chuckroll/Clod Fresh	690 - 875	736.54	680-720	717.16	729-795	735.08	-0.2%	2.5%
Striploin Fresh	920 - 1,875	1,309.93	1,077-1,874	1,319.14	760-1,880	1,407.73	7.5%	6.7%
Tenderloin Fresh	1,995 - 2,590	2,235.68	2,060-2,557	2,295.43	2,000-2,586	2,211.87	-1.1%	-3.6%
Grnd 85% Bulk, Frozen	635 - 979	792.00	590-774	658.26	580-774	652.44	-17.6%	-0.9%
Grnd 85% Patties, Fresh	N/A	N/A	N/A	N/A	760-784	770.00	-	-
Grnd 85% Patties, Frozen	595 - 787	651.07	600-785	685.02	585-772	691.53	6.2%	1.0%

*source USDA

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

	Mid-July 2019 Pricing	Mid-August 2019 Pricing	Mid-September 2019 Pricing	Mid-October 2019 Pricing
Tenderloin - Fresh	\$52.00 - \$57.00	\$50.00 - \$52.00	\$50.00 - \$55.00	\$50.00 - \$55.00
Strip Loin Boneless - Fresh	\$32.95 - \$36.00	\$32.95 - \$34.00	\$32.95 - \$36.00	\$32.95 - \$34.00
Inside Round - Fresh	\$18.45 - \$20.00	\$18.45 - \$20.00	\$19.40 - \$19.00	\$18.45 - \$20.00
Ground 90% Bulk Fresh	\$16.95 - \$18.95	\$16.95 - \$18.95	N/A	\$16.95 - \$18.95
Fresh Bison Trim	\$13.45 - \$16.50	\$11.95 - \$15.00	\$11.95 - \$15.00	\$11.95 - \$15.50

*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			Vold, Jones & Vold Auction Co. Ltd. (AB) (January 19, 2019) Head Sold: 372			Vold, Jones & Vold Auction Co. Ltd. (AB) (March 16, 2019) Head Sold: 189		
Calves	Bulls	Heifers	Calves	Bulls	Heifers	Calves	Bulls	Heifers
500 lbs +			500 lbs +	\$300.00 - \$380.00	\$220.00 - \$310.00	500 lbs +	\$305.00 - \$340.00	\$275.00 - \$325.00
400 - 499 lbs	\$380.00 - \$435.00	\$350.00 - \$390.00	400 - 499 lbs	\$360.00 - \$410.00	\$270.00 - \$310.00	400 - 499 lbs	\$310.00 - \$380.00	\$320.00 - \$335.00
300 - 399 lbs	\$380.00 - \$435.01	\$350.00 - \$390.01	300 - 399 lbs	\$360.00 - \$400.00	\$270.00 - \$325.00	300 - 399 lbs	\$300.00 - \$370.00	\$260.00 - \$305.00
Under 300 lbs			Under 300 lbs	\$315.00 - \$340.00	\$240.00 - \$260.00	Under 300 lbs	\$275.00 - \$305.00	\$200.00 - \$265.00
Yearlings	Bulls	Heifers	Yearlings	Bulls	Heifers	Yearlings	Bulls	Heifers
700 - 799 lbs	\$250.00 - \$300.00	\$250.00 - \$280.00	700 - 799 lbs	\$270.00 - \$305.00	\$230.00 - \$250.00	700 - 799 lbs	\$305.00 - \$300.00	
600 - 699 lbs	\$250.00 - \$300.00	\$250.00 - \$280.00	600 - 699 lbs	\$300.00 - \$330.00	\$220.00 - \$270.00	600 - 699 lbs	\$310.00 - \$330.00	\$240.00 - \$265.00
500 - 599 lbs	\$270.00 - \$330.00	\$270.00 - \$315.00	500 - 599 lbs	\$300.00 - \$380.00	\$200.00 - \$250.00	500 - 599 lbs	\$170.00 - \$330.00	\$160.00 - \$275.00
400 - 499 lbs	\$270.00 - \$330.00	\$270.00 - \$315.00	400 - 499 lbs	\$290.00 - \$310.00	\$200.00 - \$310.00	400 - 499 lbs	\$215.00 - \$355.00	\$175.00 - \$265.00
Under 400 lbs			Under 400 lbs			Under 400 lbs		\$175.00 - \$260.00
Mature Bulls			Mature Cows			Mature Bulls		
1250 lbs +		— - \$180.00	1250 lbs+		\$165.00 - \$195.00	1250 lbs +		\$195.00 - \$2200.00
950 - 1249 lbs		\$180.00 - \$200.00	950 - 1249 lbs		\$165.00 - \$195.01			
Younger Breds		\$2,600 - \$2,650	Mature Cows			Younger Cows		
Older Breds		\$1,700 - \$2,000	750 - 949 lbs		\$165 - \$215	700 - 949 lbs		— - \$180.00
Younger Pairs		— - \$2,800.00	Older Bred		\$1600 - \$1900			

Commentary

By Terry Kremenliuk, 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-October 2019 for finished bison were marginally lower than September prices. Most new sales are at \$4.90 - \$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 41 weeks of 2019 (week ending October 12, 2019) reached 6,334 head – down 3.6% from the 6,572 animals slaughtered in 2018 during the same period. Live animal exports to the US for the first nine months of 2019 totaled 16,576 head – up 24.7% when compared to the 13,289 bison exported during the same time period in 2018.

Marketers report that the demand for bison trim has been steady. The demand for tenderloins and rib-eyes is steady, while the demand for striploins continues to be slow. US demand continues to be steady. The introduction of bison burgers by A & W in Manitoba and Saskatchewan is expected to create some consumer momentum. Introduction of bison products by major food stores is expected to add to this momentum. Canadian bison industry attendance at Anuga, the large food show in Germany, is expected to have positive results. With the Comprehensive Economic Trade Agreement with the European Union in effect since September 21, 2017, demand for bison is expected to continue to increase with a number of distributors expressing interest in bison. North American demand continues to be steady. Canadian demand has shown some increase over the summer.

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 is expected to allow producers to retain animals they may have previously planned on marketing. Calf prices in the fall of 2019 and in the first quarter of 2020 are expected to be below last year's levels.

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

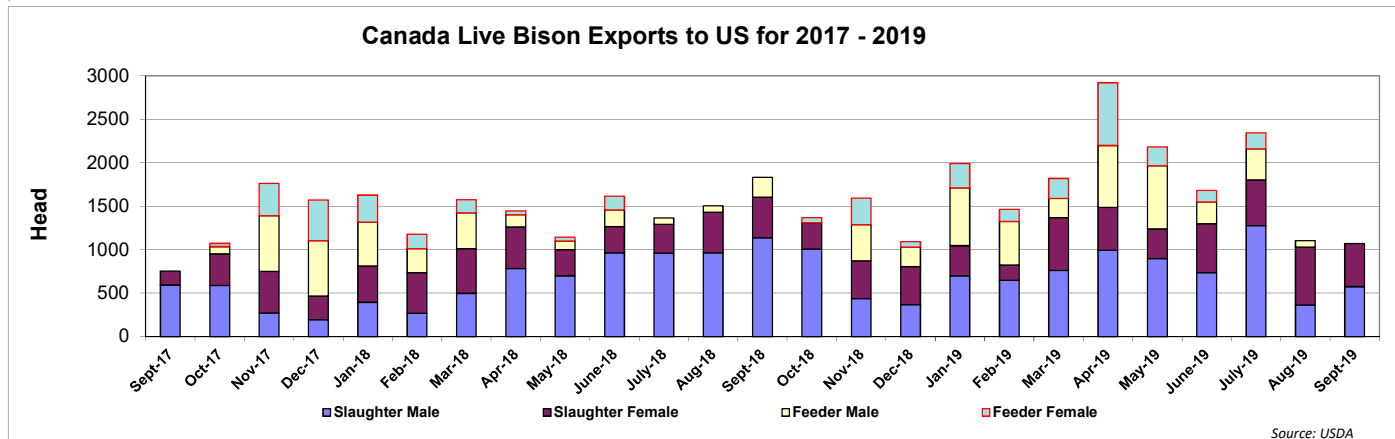
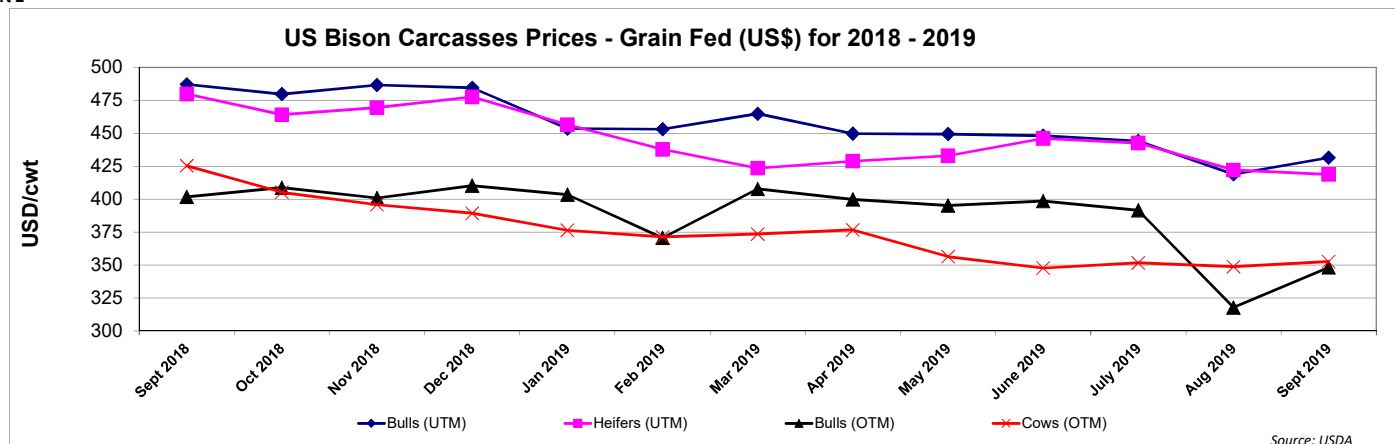


Chart 2



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

Contact: Diane Blandford (613) 773-0816 (diane.blandford@canada.ca), see us at: <http://www.agr.gc.ca/redmeat>