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 20, 2019.

Weekly Federal Bison Slaughter

	5-Oct	12-Oct	19-Oct	26-Oct	October Total	January - October YTD 2019	2018	% Change
Total Canada	*1*	*246*	*3*	*317*	**567**	**6,654**	**6,816**	**-2.4%**
previous year	*92*	*45*	*220*	*24*	***381***			

Provincially Inspected Slaughter

	May 2019	June 2019	July 2019	August 2019	Sept 2019	Sept 2018	January - September YTD 2019	2018	% Change
Alberta	51	38	61	42	29	51	405	488	-17.0%
Saskatchewan	13	12	11	22	7	8	115	72	59.7%
Manitoba/BC	17	28	43	24	15	33	247	253	-2.4%
Ontario/Quebec	28	44	42	39	31	40	287	292	-1.7%
Total	**109**	**122**	**157**	**127**	**82**	**132**	**1,054**	**1,105**	**-4.6%**

	YTD 2019	YTD 2018	% Change
Total Canadian Federal and Provincial Slaughter *	**7,708**	**7,921**	**-2.7%**

**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 - September YTD 2019	2018	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	10,013	7,141	7,540	**-5.3%**
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**	**22,647**	**18,995**	**19.2%**

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

US Federal Slaughter*

for week ending:	5-Oct	12-Oct	19-Oct	26-Oct	October Total	January - October YTD 2019	2018	% Change
	1,040	**1,067**	**1,048**	**1,018**	**4,173**	**44,700**	**42,283**	**5.7%**
previous year	*913*	*884*	*952*	*990*	***3,739***			

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

Canada Live Bison Exports to US

	June - 19	July - 19	August - 19	September - 19	October - 19	January - October YTD 2019	2018	% Change
Slaughter Male	736	1275	364	576	1033	7,983	7,681	**3.9%**
Slaughter Female	562	528	666	494	348	4,566	4,045	**12.9%**
Feeder Male	252	357	75	0	63	3,572	1,992	**79.3%**
Feeder Female	131	183	0	0	0	1,899	940	**102.0%**
Total	**1,681**	**2,343**	**1,105**	**1,070**	**1,444**	**18,020**	**14,658**	**22.9%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		April 2019	May 2019	June 2019	July 2019	August 2019	Sept 2019	January - September YTD 2019	2018	% Change
United States	Kg	43,163	28,411	49,682	39,838	25,247	22,652	**441,848**	**296,590**	**49.0%**
	Value ($Cdn)	844,157	552,686	704,144	681,494	400,034	353,731	**7,335,799**	**5,749,757**	**27.6%**
France	Kg	2,285	531	3,675	10,263	169	-	**32,120**	**58,534**	**-45.1%**
	Value ($Cdn)	83,686	23,375	119,492	329,828	7,567	-	**1,042,817**	**1,589,872**	**-34.4%**
Switzerland	Kg	1,509	1,191	1,818	881	1,933	1,148	**34,008**	**50,507**	**-32.7%**
	Value ($Cdn)	44,721	54,900	75,319	40,489	72,097	50,887	**871,259**	**1,613,952**	**-46.0%**
Saint Pierre and Miquelon	Kg	6,805	5,703	5,353	-	4,708	5,421	**41,844**	**41,507**	**0.8%**
	Value ($Cdn)	74,605	52,927	46,429	-	48,229	49,277	**400,057**	**372,855**	**7.3%**
Germany	Kg	18,171	23,160	21,350	-	-	27,835	**181,289**	**52,400**	**246.0%**
	Value ($Cdn)	195,571	237,020	222,101	-	-	284,327	**1,854,054**	**499,776**	**271.0%**
Mexico	Kg	20,456	-	14,259	-	-	17,148	**61,685**	**68,688**	**-10.2%**
	Value ($Cdn)	176,729	-	101,866	-	-	157,369	**509,498**	**662,479**	**-23.1%**
Netherlands	Kg	453	974	-	355	1,150	205	**4,789**	**3,452**	**38.7%**
	Value ($Cdn)	12,914	28,661	-	11,983	25,853	2,914	**148,931**	**121,085**	**23.0%**
Other Countries	Kg	13,385	4,538	2,105	954	1,078	40,283	**65,758**	**522**	**12497.3%**
	Value ($Cdn)	211,615	143,061	15,417	43,672	34,551	535,177	**1,057,909**	**6,484**	**16215.7%**
Total	**Kg**	**106,227**	**64,508**	**98,242**	**52,291**	**34,285**	**114,692**	**863,341**	**572,200**	**50.9%**
	Value ($Cdn)	**1,643,998**	**1,092,630**	**1,284,768**	**1,107,466**	**588,331**	**1,433,682**	**13,220,324**	**10,616,260**	**24.5%**

Bone-in		April 2019	May 2019	June 2019	July 2019	August 2019	Sept 2019	January - September YTD 2019	2018	% Change
Total	**Kg**	**8,731**	**15,629**	**5,697**	**5,702**	**18,517**	**7,672**	**92,627**	**335,408**	**-72.4%**
	Value ($Cdn)	**73,989**	**140,042**	**38,892**	**38,625**	**117,148**	**56,656**	**818,168**	**3,250,147**	**-74.8%**

Total Exports, Boneless and Bone-in		April 2019	May 2019	June 2019	July 2019	August 2019	Sept 2019	January - September YTD 2019	2018	% Change
	Kg	**114,958**	**80,137**	**103,939**	**57,993**	**52,802**	**122,364**	**955,968**	**907,608**	**5.3%**
	Value ($Cdn)	**1,717,987**	**1,232,672**	**1,323,660**	**1,146,091**	**705,479**	**1,490,338**	**14,038,492**	**13,866,407**	**1.2%**

**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 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
Oct 2019	425.21	390.44	342.79	346.26

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Nov 2019	480-500	460-490	300-350	300-350

**source CBA survey of marketers*

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

	August 2019		September 2019		October 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,298-1,881	1,571.36	1,401-1,882	1,753.17	1,199-1,909	1,563.11	-0.5%	-10.8%
Chuckroll/Clod Fresh	680-720	717.16	729-795	735.08	650-690	672.10	-6.3%	-8.6%
Striploin Fresh	1,077-1,874	1,319.14	760-1,880	1,407.73	1,005-1,883	1,210.13	-8.3%	-14.0%
Tenderloin Fresh	2,060-2,557	2,295.43	2,000-2,586	2,211.87	1,979-2,417	2,127.49	-7.3%	-3.8%
Grnd 85% Bulk, Frozen	590-774	658.26	580-774	652.44	620-768	672.46	2.2%	3.1%
Grnd 85% Patties, Fresh	N/A	N/A	760-784	770.00	760-818	771.02	-	0.1%
Grnd 85% Patties, Frozen	600-785	685.02	585-772	691.53	630-765	689.39	0.6%	-0.3%

**source USDA*

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

	Mid-August 2019 Pricing	Mid-September 2019 Pricing	Mid-October 2019 Pricing	Mid-November 2019 Pricing
Tenderloin - Fresh	$50.00 - $52.00	$50.00 - $55.00	$50.00 - $55.00	$50.00 - $55.00
Strip Loin Boneless - Fresh	$32.95 - $34.00	$32.95 - $36.00	$32.95 - $34.00	$32.95 - $36.00
Inside Round - Fresh	$18.45 - $20.00	$19.40 - $19.00	$18.45 - $20.00	$18.45 - $20.00
Ground 90% Bulk Fresh	$16.95 - $18.95	N/A	$16.95 - $18.95	$16.95 - $18.95
Fresh Bison Trim	$11.95 - $15.00	$11.95 - $15.00	$11.95 - $15.50	$11.95 - $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 to mid-November 2019 for finished bison were stable with some downward pressure. Although there are contracted prices in the $5.00 per pound HHW range, prices being offered on new sales were at $4.80 - $5.00 per pound HHW for grade "A" bulls for later delivery as current supply is more than adequate to meet consumer demand. 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 offering $4.50 - $4.80 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 45 weeks of 2019 (week ending November 9, 2019) reached 7,017 head – down 2.2% from the 7,173 animals slaughtered in 2018 during the same period. Live animal exports to the US for the first 10 months of 2019 totaled 18,020 head – up 22.9% when compared to the 14,658 bison exported for the same period in 2018.

Marketers report that the demand for bison trim has been steady but inventory is still burdensome for some. 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 meat exports to the US increasing by about 50% compared to the January to September period last year. Data also shows that although there has been a decrease in meat exports to France and Switzerland, exports to Germany have increased almost four-fold while exports to the Netherlands increased by 40%. Total Canadian bison meat exports in total are up 60% in weight compared to 2018. Canadian bison being shipped from the U.S. to Europe is not included in this data.

The Canadian marketers indicate that present supplies of finished bison continue to be more than adequate for the next six months. Although the Canadian bison calf sales are about to begin, 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

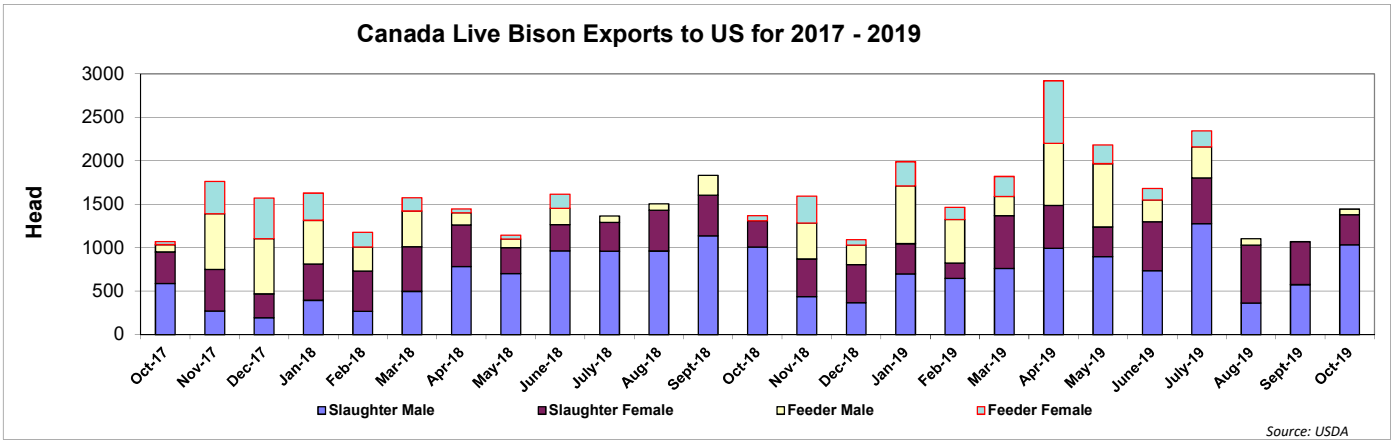
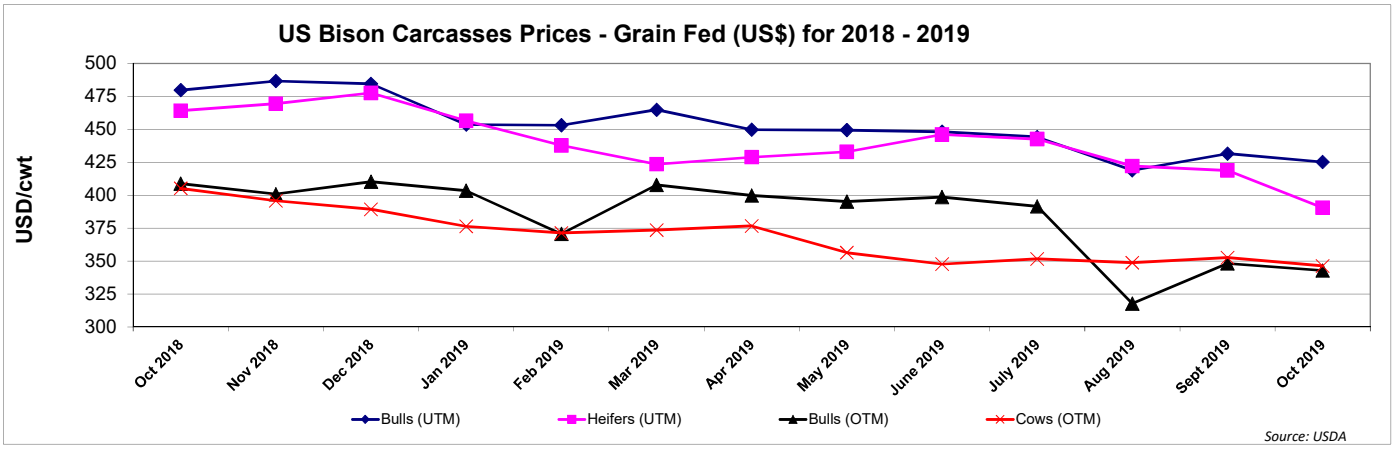


Chart 2



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**