Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - December 20, 2019.

Weekly Federal Bison Slaughter

	2-Nov	9-Nov	16-Nov	23-Nov	November Total	January - November YTD 2019	2018	% Change
Total Canada	*53*	*184*	*128*	*210*	**575**	**7,279**	**7,806**	**-6.8%**
previous year	*271*	*86*	*174*	*459*	***990***			

Provincially Inspected Slaughter

	June 2019	July 2019	August 2019	Sept 2019	Oct 2019	Oct 2018	January - October YTD 2019	2018	% Change
Alberta	38	61	42	29	45	59	450	547	-17.7%
Saskatchewan	12	11	22	7	8	13	123	85	44.7%
Manitoba/BC	31	43	24	15	20	17	277	298	-7.0%
Ontario/Quebec	44	42	39	31	34	60	321	352	-8.8%
Total	**125**	**157**	**127**	**82**	**107**	**149**	**1,171**	**1,282**	**-8.7%**

	YTD 2019	YTD 2018	% Change
Total Canadian Federal and Provincial Slaughter *	**8,450**	**9,088**	**-7.0%**

**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 - October YTD 2019	2018	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	10,013	7,875	8,098	**-2.8%**
Total Live Exports	16,769	19,033	26,162	18,364	17,600	17,342	18,020	14,658	**22.9%**
Total Production	**31,157**	**33,404**	**40,348**	**29,932**	**28,486**	**27,316**	**25,895**	**22,756**	**13.8%**

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

US Federal Slaughter*

for week ending:	2-Nov	9-Nov	16-Nov	23-Nov	November Total	January - November YTD 2019	2018	% Change
	1,166	**1,050**	**1,129**	**984**	**4,329**	**49,029**	**46,450**	**5.6%**
previous year	*1,027*	*1,078*	*1,068*	*994*	***4,167***			

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

Canada Live Bison Exports to US

	July - 19	August - 19	September - 19	October - 19	November - 19	January - November YTD 2019	2018	% Change
Slaughter Male	1275	364	576	1033	614	8,597	8,119	**5.9%**
Slaughter Female	528	666	494	348	437	5,003	4,478	**11.7%**
Feeder Male	357	75	0	63	0	3,572	2,407	**48.4%**
Feeder Female	183	0	0	0	0	1,899	1,247	**52.3%**
Total	**2,343**	**1,105**	**1,070**	**1,444**	**1,051**	**19,071**	**16,251**	**17.4%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		May 2019	June 2019	July 2019	August 2019	Sept 2019	Oct 2019	January - October YTD 2019	2018	% Change
United States	Kg	28,411	49,682	39,838	25,247	22,652	29,168	**471,016**	**314,714**	**49.7%**
	Value ($Cdn)	552,686	704,144	681,494	400,034	353,731	482,879	**7,818,678**	**6,166,455**	**26.8%**
France	Kg	531	3,675	10,263	169	-	-	**32,120**	**65,692**	**-51.1%**
	Value ($Cdn)	23,375	119,492	329,828	7,567	-	-	**1,042,817**	**1,806,818**	**-42.3%**
Switzerland	Kg	1,191	1,818	881	1,933	1,148	1,501	**35,509**	**55,889**	**-36.5%**
	Value ($Cdn)	54,900	75,319	40,489	72,097	50,887	56,032	**927,291**	**1,772,331**	**-47.7%**
Saint Pierre and Miquelon	Kg	5,703	5,353	-	4,708	5,421	-	**41,844**	**46,291**	**-9.6%**
	Value ($Cdn)	52,927	46,429	-	48,229	49,277	-	**400,057**	**415,964**	**-3.8%**
Germany	Kg	23,160	21,350	-	-	27,835	-	**181,289**	**109,318**	**65.8%**
	Value ($Cdn)	237,020	222,101	-	-	284,327	-	**1,854,054**	**1,053,610**	**76.0%**
Mexico	Kg	-	14,259	-	-	17,148	-	**61,685**	**68,688**	**-10.2%**
	Value ($Cdn)	-	101,866	-	-	157,369	-	**509,498**	**662,479**	**-23.1%**
Netherlands	Kg	974	-	355	1,150	205	3,288	**8,077**	**3,452**	**134.0%**
	Value ($Cdn)	28,661	-	11,983	25,853	2,914	96,268	**245,199**	**121,085**	**102.5%**
Other Countries	Kg	4,538	2,105	954	1,078	40,283	5,273	**71,031**	**733**	**9590.5%**
	Value ($Cdn)	143,061	15,417	43,672	34,551	535,177	153,414	**1,211,323**	**8,629**	**13937.8%**
Total	**Kg**	**64,508**	**98,242**	**52,291**	**34,285**	**114,692**	**39,230**	**902,571**	**664,777**	**35.8%**
	Value ($Cdn)	**1,092,630**	**1,284,768**	**1,107,466**	**588,331**	**1,433,682**	**788,593**	**14,008,917**	**12,007,371**	**16.7%**

Bone-in		May 2019	June 2019	July 2019	August 2019	Sept 2019	Oct 2019	January - October YTD 2019	2018	% Change
Total	**Kg**	**15,629**	**5,697**	**5,702**	**18,517**	**7,672**	**7,409**	**100,036**	**368,767**	**-72.9%**
	Value ($Cdn)	**140,042**	**38,892**	**38,625**	**117,148**	**56,656**	**52,355**	**870,523**	**3,758,655**	**-76.8%**

Total Exports, Boneless and Bone-in		May 2019	June 2019	July 2019	August 2019	Sept 2019	Oct 2019	January - October YTD 2019	2018	% Change
	Kg	**80,137**	**103,939**	**57,993**	**52,802**	**122,364**	**46,639**	**1,002,607**	**1,033,544**	**-3.0%**
	Value ($Cdn)	**1,232,672**	**1,323,660**	**1,146,091**	**705,479**	**1,490,338**	**840,948**	**14,879,440**	**15,766,026**	**-5.6%**

**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)
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
Nov 2019	430.59	395.18	335.61	339.92

**source USDA*

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

wghtd avg

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

**source CBA survey of marketers*

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

	September 2019		October 2019		November 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,401-1,882	1,753.17	1,199-1,909	1,563.11	1,315-1,906	1,627.58	-7.2%	4.1%
Chuckroll/Clod Fresh	729-795	735.08	650-690	672.10	650-690	673.14	-8.4%	0.2%
Striploin Fresh	760-1,880	1,407.73	1,005-1,883	1,210.13	1,074-1,888	1,227.85	-12.8%	1.5%
Tenderloin Fresh	2,000-2,586	2,211.87	1,979-2,417	2,127.49	2,038-2,160	2,083.27	-5.8%	-2.1%
Grnd 85% Bulk, Frozen	580-774	652.44	620-768	672.46	620-771	681.15	4.4%	1.3%
Grnd 85% Patties, Fresh	760-784	770.00	760-818	771.02	760-784	764.01	-0.8%	-0.9%
Grnd 85% Patties, Frozen	585-772	691.53	630-765	689.39	635-783	712.25	3.0%	3.3%

**source USDA*

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

	Mid-September 2019 Pricing	Mid-October 2019 Pricing	Mid-November 2019 Pricing	Mid-December 2019 Pricing
Tenderloin - Fresh	$50.00 - $55.00	$50.00 - $55.00	$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 - $36.00
Inside Round - Fresh	$19.40 - $19.00	$18.45 - $20.00	$18.45 - $20.00	$18.45 - $20.00
Ground 90% Bulk Fresh	N/A	$16.95 - $18.95	$16.95 - $18.95	$16.95 - $18.95
Fresh Bison Trim	$11.95 - $15.00	$11.95 - $15.50	$11.95 - $16.50	$11.95 - $16.50

**source CBA survey of marketers*

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

Ritchie Bros. Auctioneers (SK) (December 11, 2019)
Head Sold: 432

Class	# of head	Average/PD
2019 Bulls (500 lbs plus)	10	2.58
2019 Bulls (400-499lbs)	70	2.47
2019 Bulls (300-399lbs)	38	2.17
2019 Bulls (under 300lbs)	2	1.76
2018 Bulls (900 lbs plus)	9	2.09
2018 Bulls (800-899lbs)	22	2.40
2018 Bulls (700-799lbs)	36	2.28
2018 Bulls (600-699lbs)	19	1.77
2018 Bulls (500-599lbs)	6	1.74
2018 Bulls (under 500lbs)	2	1.60
2017 Bulls (1000lbs plus)	8	1.69
2017 Bulls (under 1000lbs)	28	1.84
2014/2015 Bulls (1000lbs+)	7	1.22
2019 Heifers (400-499lbs)	41	2.27
2019 Heifers (300-399lbs)	43	1.99
2019 Heifers (under 300lbs)	6	1.45
2018 Heifers (700-799 lbs)	1	1.64
2018 Heifers (600-699 lbs)	14	1.73
2018 Heifers (500-599 lbs)	6	1.53
2018 Heifers (under 500lbs)	7	2.16
2018 Heifers (Preg tested) 650-750lbs	10	1.89
2017 Bred Heifers (900-1008lbs)	26	2.72
2017 Bred Heifers (700-899lbs)	18	2.18
2017 Heifers (1025 lbs)	1	1.56
Bred Mature Cows (895-930lbs)	2	1.48

Jack Auction Group (SK) (December 7, 2019)
Head Sold: 941 (Video Bison Auction)

Class	Weight	Price
Bull Calves	425-525 lbs	$2.50 to $2.90 (sales to $3.10)
Heifer Calves	400-475 lbs	$2.05 to $2.10 (sales to $2.24)
2018 Yearling Bulls	775-975 lbs	$2.25 to $2.40 (sales to $2.49)
2018 Yearling Heifer:	650-775 lbs	$1.70 to $1.75 (sales to $1.84)
Premium Bred Heifers		$3,800 to $4,050
Lighter Bred Heifers		$2,500 to $2,825
Bred Cows		$2,090 to $2,225
Cull Bulls & Cows		$1.30 to $1.60

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-December 2019 for finished bison were stable, with widening of the high and low prices offered. Prices being offered on new sales were at $4.40 - $5.40 per pound HHW for grade "A" bulls. U.S. buyers are offering prices that equate to $5.00 - $5.40 per pound HHW with returns dependent on quality, export costs and exchange rates. Canadian buyers are offering $4.40 - $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 49 weeks of 2019 (week ending December 7, 2019) reached 7,800 head – down 5.5% from the 8,257 animals slaughtered in 2018 during the same period. Live animal exports to the US for the first 11 months of 2019 totaled 19,071 head – up 17.4% when compared to the 16,251 bison exported for the same period in 2018. A major portion of the increase was larger exports of feeder bulls and heifers.

Marketers report that the demand for bison trim has been steady, with reduced inventory as prices have been discounted. 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 boneless meat exports to the US increasing by almost 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 boneless bison meat exports 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. Initial Canadian bison fall calf sales have 500 lb. bull calves selling at $2.50 to $3.00 per pound.

Bison prices in Canada are expected to continue to be sensitive to Canada - US exchange rates. Returns to Canadian producers will fluctuate as the value of the Canadian dollar changes.

Chart 1

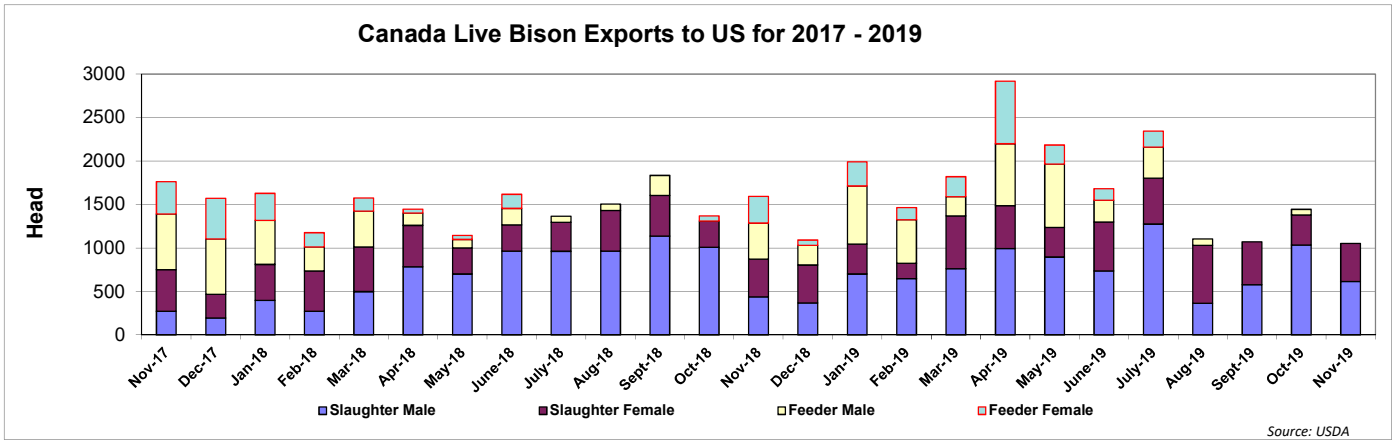
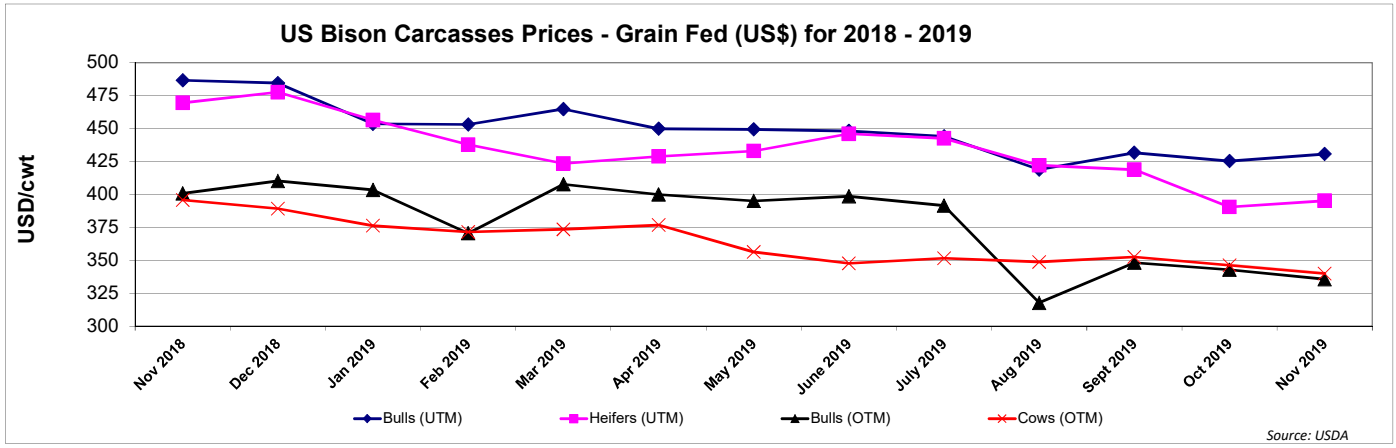


Chart 2



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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