Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - January 24, 2020.

Weekly Federal Bison Slaughter

	30-Nov	7-Dec	14-Dec	21-Dec	28-Dec	December Total	January - December YTD 2019	2018	% Change
Total Canada	*250*	*271*	*78*	*169*	*41*	**809**	**8,088**	**8,530**	**-5.2%**
previous year	*216*	*235*	*213*	*45*	*15*	***724***			

Provincially Inspected Slaughter

	July 2019	August 2019	Sept 2019	Oct 2019	Nov 2019	Nov 2018	January - November YTD 2019	2018	% Change
Alberta	61	42	29	35	54	38	494	585	-15.6%
Saskatchewan	11	22	7	8	17	13	140	98	42.9%
Manitoba/BC	43	24	15	20	21	24	298	322	-7.5%
Ontario/Quebec	42	39	31	33	39	42	359	394	-8.9%
Total	**157**	**127**	**82**	**96**	**131**	**117**	**1,291**	**1,399**	**-7.7%**

	YTD 2019	YTD 2018	% Change
Total Canadian Federal and Provincial Slaughter *	**9,379**	**9,929**	**-5.5%**

**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 - November YTD 2019	2018	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	10,041	8,570	9,205	**-6.9%**
Total Live Exports	16,769	19,033	26,162	18,364	17,600	17,342	19,071	16,251	**17.4%**
Total Production	**31,157**	**33,404**	**40,348**	**29,932**	**28,486**	**27,316**	**27,641**	**25,456**	**8.6%**

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

US Federal Slaughter*

for week ending:	30-Nov	7-Dec	14-Dec	21-Dec	28-Dec	December Total	January - December YTD 2019	2018	% Change
	855	**1,242**	**1,079**	**1,086**	**760**	**5,022**	**54,051**	**50,864**	**6.3%**
previous year	*893*	*872*	*1,053*	*1,007*	*589*	***4,414***			

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

Canada Live Bison Exports to US

	August - 19	September - 19	October - 19	November - 19	December - 19	January - December YTD 2019	2018	% Change
Slaughter Male	364	576	1033	614	591	9,188	8,487	**8.3%**
Slaughter Female	666	494	348	437	398	5,401	4,914	**9.9%**
Feeder Male	75	0	63	0	0	3,572	2,633	**35.7%**
Feeder Female	0	0	0	0	0	1,899	1,308	**45.2%**
Total	**1,105**	**1,070**	**1,444**	**1,051**	**989**	**20,060**	**17,342**	**15.7%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		June 2019	July 2019	August 2019	Sept 2019	Oct 2019	Nov 2019	January - November YTD 2019	2018	% Change
United States	Kg	49,682	39,838	25,247	22,652	29,095	46,719	**517,662**	**343,028**	**50.9%**
	Value ($Cdn)	704,144	681,494	400,034	353,731	479,471	649,271	**8,464,541**	**6,756,824**	**25.3%**
France	Kg	3,675	10,263	169	-	-	2,632	**34,752**	**74,842**	**-53.6%**
	Value ($Cdn)	119,492	329,828	7,567	-	-	79,612	**1,122,429**	**2,151,814**	**-47.8%**
Switzerland	Kg	1,818	881	1,933	1,148	1,501	1,329	**36,838**	**59,166**	**-37.7%**
	Value ($Cdn)	75,319	40,489	72,097	50,887	56,032	52,330	**979,621**	**1,879,989**	**-47.9%**
	Kg	5,353	-	4,708	5,421	-	4,884	**46,728**	**51,168**	**-8.7%**
Saint Pierre and Miquelon	Value ($Cdn)	46,429	-	48,229	49,277	-	44,121	**444,178**	**460,108**	**-3.5%**
Germany	Kg	21,350	-	-	27,835	-	36,105	**217,394**	**129,339**	**68.1%**
	Value ($Cdn)	222,101	-	-	284,327	-	372,560	**2,226,614**	**1,250,858**	**78.0%**
Mexico	Kg	14,259	-	-	17,148	-	21,831	**83,516**	**68,688**	**21.6%**
	Value ($Cdn)	101,866	-	-	157,369	-	176,648	**686,146**	**662,479**	**3.6%**
Netherlands	Kg	-	355	1,150	205	3,288	3,631	**11,708**	**3,452**	**239.2%**
	Value ($Cdn)	-	11,983	25,853	2,914	96,268	112,040	**357,239**	**121,085**	**195.0%**
Other Countries	Kg	2,105	954	1,078	40,283	5,273	24,412	**95,443**	**4,841**	**1871.6%**
	Value ($Cdn)	15,417	43,672	34,551	535,177	153,414	372,448	**1,583,771**	**119,405**	**1226.4%**
Total	**Kg**	**98,242**	**52,291**	**34,285**	**114,692**	**39,157**	**141,543**	**1,044,041**	**734,524**	**42.1%**
	Value ($Cdn)	**1,284,768**	**1,107,466**	**588,331**	**1,433,682**	**785,185**	**1,859,030**	**15,864,539**	**13,402,562**	**18.4%**

Bone-in		June 2019	July 2019	August 2019	Sept 2019	Oct 2019	Nov 2019	January - November YTD 2019	2018	% Change
Total	**Kg**	**5,697**	**5,702**	**18,517**	**7,672**	**7,409**	**11,688**	**111,724**	**392,823**	**-71.6%**
	Value ($Cdn)	**38,892**	**38,625**	**117,148**	**56,656**	**52,355**	**85,562**	**956,085**	**4,043,354**	**-76.4%**

Total Exports, Boneless and Bone-in		June 2019	July 2019	August 2019	Sept 2019	Oct 2019	Nov 2019	January - November YTD 2019	2018	% Change
	Kg	**103,939**	**57,993**	**52,802**	**122,364**	**46,566**	**153,231**	**1,155,765**	**1,127,347**	**2.5%**
	Value ($Cdn)	**1,323,660**	**1,146,091**	**705,479**	**1,490,338**	**837,540**	**1,944,592**	**16,820,624**	**17,445,916**	**-3.6%**

**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)
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
Dec 2019	433.87	402.09	340.25	332.35

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Jan 2020	480-525	460-490	300-350	300-350

**source CBA survey of marketers*

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

	October 2019		November 2019		December 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,199-1,909	1,563.11	1,315-1,906	1,627.58	1,312-1,873	1,656.17	6.0%	1.8%
Chuckroll/Clod Fresh	650-690	672.10	650-690	673.14	650-700	674.18	0.3%	0.2%
Striploin Fresh	1,005-1,883	1,210.13	1,074-1,888	1,227.85	1,065-1,879	1,265.12	4.5%	3.0%
Tenderloin Fresh	1,979-2,417	2,127.49	2,038-2,160	2,083.27	1,944-2,385	2,134.23	0.3%	2.4%
Grnd 85% Bulk, Frozen	620-768	672.46	620-771	681.15	585-756	706.35	5.0%	3.7%
Grnd 85% Patties, Fresh	760-818	771.02	760-784	764.01	760-784	766.01	-0.6%	0.3%
Grnd 85% Patties, Frozen	630-765	689.39	635-783	712.25	726-771	754.46	9.4%	5.9%

**source USDA*

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

	Mid-October 2019 Pricing	Mid-November 2019 Pricing	Mid-December 2019 Pricing	Mid-January 2020 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 - $34.00	$32.95 - $36.00	$32.95 - $36.00	$33.00 - $36.00
Inside Round - Fresh	$18.45 - $20.00	$18.45 - $20.00	$18.45 - $20.00	$19.00 - $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	$11.95 - $15.50	$11.95 - $16.50	$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 diane.blandford@canada.ca

Prices offered to producers to mid-January 2020 for finished bison were stable. Prices being offered on new sales were at $4.40 - $5.25 per pound HHW for grade "A" bulls. U.S. buyers are offering prices that equate to $5.00 - $5.40 per pound HHW at the slaughter plant 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 52 weeks of 2019 reached 8,088 head – down 5.2% from the 8,530 animals slaughtered in 2018. Federal slaughter for the first two weeks in 2020 is comparable to the 2019 slaughter for the same time period. Live animal exports to the US throughout 2019 totaled 20,060 head – up 15.7% when compared to the 17,342 bison exported during 2018. A major portion of the increase was increased 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 50% during January to November 2019, compared to the same time period in 2018. Data also shows that although there has been a decrease in meat exports to France and Switzerland, exports to Germany and the Netherlands have increased. Total exports to Europe have increased by about 10%; almost four-fold, while exports to the Netherlands increased by 40%. 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 with some sales reported 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

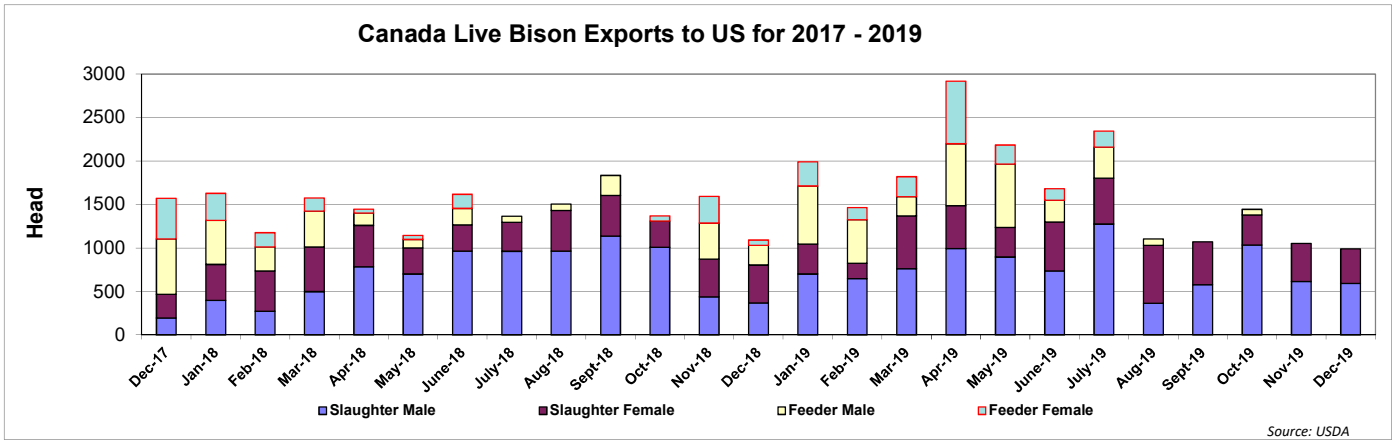
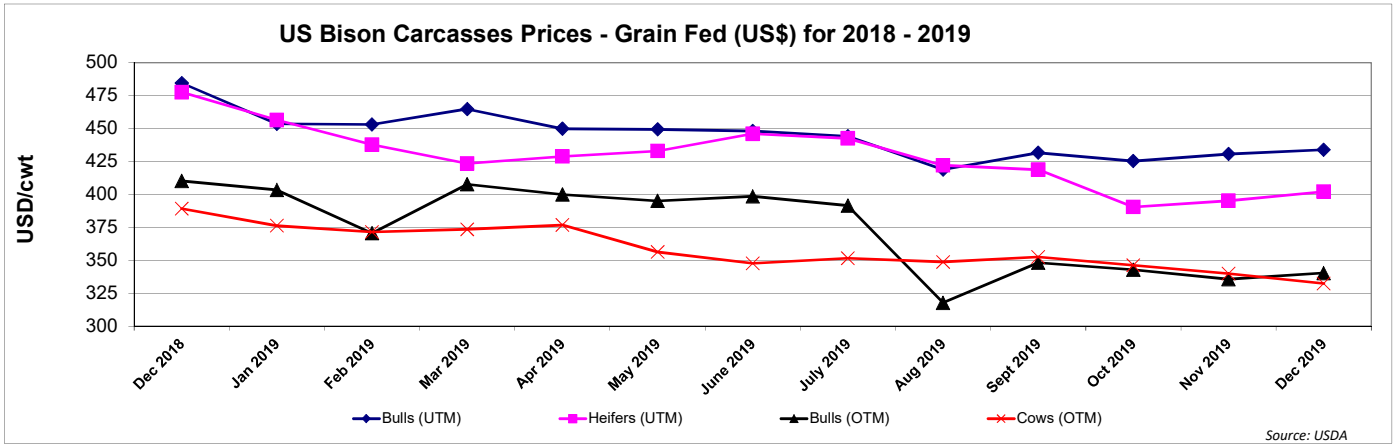


Chart 2



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