Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - March 18, 2019.

Weekly Federal Bison Slaughter

	5-Jan	12-Jan	19-Jan	26-Jan	January Total	Month of January 2019	2018	% Change
Total Canada	*129*	*142*	*142*	*124*	**537**	**537**	**690**	**-22.2%**
previous year	*114*	*250*	*196*	*130*	***690***			

Provincially Inspected Slaughter

	August 2018	September 2018	October 2018	November 2018	December 2018	December 2017	January - December YTD 2018	2017	% Change
Alberta	47	51	59	38	39	31	624	607	2.8%
Saskatchewan	7	8	13	13	14	3	112	66	69.7%
Manitoba/BC	13	32	17	16	31	32	307	428	-28.3%
Ontario/Quebec**	37	40	60	34	15	35	401	416	-3.6%
Total	**104**	**131**	**149**	**101**	**99**	**101**	**1,444**	**1,517**	**-4.8%**

	YTD 2018	YTD 2017	% Change
Total Canadian Federal and Provincial Slaughter *	**10,105**	**10,886**	**-7.2%**

**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 - December YTD 2018	2017	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	9,974	9,974	9,946	**0.3%**
Total Live Exports	16,769	19,033	26,162	18,364	17,600	17,342	17,342	17,600	**-1.5%**
Total Production	**31,157**	**33,404**	**40,348**	**29,932**	**28,486**	**27,316**	**27,316**	**27,546**	**-0.8%**

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

US Federal Slaughter*

for week ending:	5-Jan	12-Jan	19-Jan	26-Jan	January Total	Month of January 2019	2018	% Change
	792	**1,001**	**1,189**	**1,137**	**4,119**	**4,119**	**3,284**	**25.4%**
previous year	*760*	*825*	*835*	*864*	***3,284***			

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

Canada Live Bison Exports to US

	September-18	October-18	November-18	December - 18	January - 19	Month of January 2019	2018	% Change
Slaughter Male	1136	1009	438	368	700	700	396	**76.8%**
Slaughter Female	469	301	433	436	347	347	416	**-16.6%**
Feeder Male	229	0	415	226	665	665	504	**31.9%**
Feeder Female	0	59	307	61	278	278	313	**-11.2%**
Total	**1,834**	**1,369**	**1,593**	**1,091**	**1,990**	**1,990**	**1,629**	**22.2%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		July 2018	August 2018	September 2018	October 2018	November 2018	December 2018	January - December YTD 2018	2017	% Change
USA	Kg	29,118	23,669	17,735	18,124	28,314	22,070	**365,098**	**483,114**	**-24.4%**
	Value ($Cdn)	554,030	525,677	304,612	416,698	590,369	325,605	**7,082,429**	**7,964,340**	**-11.1%**
France	Kg	2,493	3,520	4,933	7,158	9,150	4,749	**79,591**	**38,340**	**107.6%**
	Value ($Cdn)	79,568	92,141	140,765	216,946	344,996	163,422	**2,315,236**	**868,020**	**166.7%**
Switzerland	Kg	5,893	4,485	5,641	5,382	3,277	5,056	**64,222**	**53,824**	**19.3%**
	Value ($Cdn)	234,291	147,354	166,035	158,379	107,658	160,462	**2,040,451**	**1,766,928**	**15.5%**
Netherlands	Kg	-	156	955	-	-	1,580	**68,688**	**20,640**	**232.8%**
	Value ($Cdn)	-	4,453	27,228	-	-	17,293	**662,479**	**383,926**	**72.6%**
Mexico	Kg	-	29,696	38,992	-	-	-	**68,688**	**-**	**N/A**
	Value ($Cdn)	-	299,317	363,162	-	-	-	**662,479**	**-**	**N/A**
United Kingdom	Kg	-	9,129	20,232	56,918	20,021	52,032	**181,371**	**-**	**N/A**
	Value ($Cdn)	-	89,581	197,158	553,834	197,248	510,221	**1,761,079**	**-**	**N/A**
Saint Pierre and Miquelon	Kg	3,925	5,259	5,340	4,784	4,877	2,238	**53,406**	**20**	**N/A**
	Value ($Cdn)	35,587	49,135	46,926	43,109	44,144	23,177	**483,285**	**44**	**N/A**
Other Countries	Kg	-	487	35	211	4,108	5,781	**10,622**	**-**	**N/A**
	Value ($Cdn)	-	5,626	858	2,145	110,776	160,450	**279,855**	**-**	**N/A**
Total	**Kg**	**41,429**	**76,401**	**93,863**	**92,577**	**69,747**	**93,506**	**828,030**	**595,938**	**38.9%**
	Value ($Cdn)	**903,476**	**1,213,284**	**1,246,744**	**1,391,111**	**1,395,191**	**1,360,630**	**14,763,192**	**10,983,258**	**34.4%**

Bone-in		July 2018	August 2018	September 2018	October 2018	November 2018	December 2018	January - December YTD 2018	2017	% Change
Total	**Kg**	**35,469**	**39,848**	**33,582**	**33,359**	**24,056**	**16,235**	**409,058**	**235,533**	**73.7%**
	Value ($Cdn)	**498,358**	**577,760**	**452,136**	**508,508**	**284,699**	**235,418**	**4,278,772**	**1,271,797**	**236.4%**

Total Exports, Boneless and Bone-in		July 2018	August 2018	September 2018	October 2018	November 2018	December 2018	January - December YTD 2018	2017	% Change
	Kg	**76,898**	**116,249**	**127,445**	**125,936**	**93,803**	**109,741**	**1,237,088**	**831,471**	**48.8%**
	Value ($Cdn)	**1,401,834**	**1,791,044**	**1,698,880**	**1,899,619**	**1,679,890**	**1,596,048**	**19,041,964**	**12,255,055**	**55.4%**

**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)
Jan 2018	483.98	470.59	434.80	416.01
Feb 2018	486.73	471.49	417.41	400.43
Mar 2018	482.80	479.99	409.63	397.03
Apr 2018	492.86	471.57	398.08	414.52
May 2018	489.88	468.65	409.47	401.40
June 2018	489.69	471.90	411.00	391.22
July 2018	485.10	479.08	409.58	397.52
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	403.26	376.26

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
Feb 2018	550-600	550-600	450-525	450-525
Mar 2018	550-600	550-600	450-500	450-500
Apr 2018	575-600	575-600	460-500	460-500
May 2018	580-600	580-600	460-490	460-490
June 2018	575-600	575-600	460-500	460-500
July 2018	575-600	575-600	460-500	460-500
Aug 2018	575-600	575-600	425-470	425-470
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 2018	550-570	530-550	400-450	400-450
Feb 2019	530-560	510-530	400-450	400-450

**source CBA survey of marketers*

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

	November 2018		December 2018		January 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1250-1630	1403.61	1187-1851	1394.84	1300-1575	1393.22	-0.7%	-0.1%
Chuckroll/Clod Fresh	620-885	655.10	620-900	661.13	620-800	666.83	1.8%	0.9%
Striploin Fresh	950-1450	1085.06	875-1450	1105.18	900-1450	1092.24	0.7%	-1.2%
Tenderloin Fresh	1800-2632	2337.95	1520-2898	2247.01	1800-2450	2210.17	-5.5%	-1.6%
Ground 90% Bulk, Fresh	625-750	700.01	600-750	624.00	600-750	630.00	-10.0%	1.0%
Ground 85% Bulk, Frozen	700-775	717.99	605-1076	727.57	650-733	687.62	-4.2%	-5.5%
Ground 85% Patties, Frozen	650-788	770.92	499-920	726.80	655-753	695.48	-9.8%	-4.3%

**source USDA*

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

	Mid-November 2018 Pricing	Mid-December 2018 Pricing	Mid-January 2019 Pricing	Mid-February 2019 Pricing
Tenderloin - Fresh	$56.00 - $59.95	$51.00 - $62.95	$51.00 - $62.95	$51.00 - $62.95
Strip Loin Boneless - Fresh	$33.00 - $35.95	$30.95 - $36.00	$30.95 - $36.00	$30.95 - $36.00
Inside Round - Fresh	$21.00 - $22.50	$17.95 - $21.40	$17.95 - $21.40	$17.95 - $21.40
Ground 90% Bulk Fresh	$18.95 - $20.95	$18.95 - $20.95	$18.95 - $20.95	$18.95 - $19.95
Fresh Bison Trim	$16.95 - $18.95	$14.95 - $18.00	$14.95 - $18.00	$14.95 - $16.00

**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		$2,600.00 - $2,650.00
Older Breds		$1,700.00 - $2,000.00
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		$165.00 - $215.00
Older Bred		$1600.00 - $1900.00

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-February were softer with most sales at $5.30 - $5.60 per pound HHW for Grade "A" bulls. .U.S. buyers are offering prices that equate to $5.50 Canadian per pound HHW with returns dependent on quality and export costs. Canadian buyers are paying up to $5.10 - $5.30 per pound HHW for Grade "A" heifers. U.S. buyers are offering prices that equate to Canadian prices with returns dependent on quality and export costs.

Nationally, federal slaughter in Canada for the first 7 weeks of 2019 reached 976 head – down 15.2% from the 1,151 animals slaughtered in 2018 during the same period.. Live animal exports to the US in 2018 totalled 19,047 head – down 11.7% from the 21,577 head exported in 2017.

Marketers report that although the demand for bison trim is steady, trim inventory is burdensome. The demand for tenderloins and rib-eyes is strong while the demand for striploins continues to be steady. US demand continues to be steady. With the Comprehensive Economic Trade Agreement with the European Union in effect since September 21, 2017, European demand continues to adjust to the CETA agreement with Brexit create some uncertainty in Europe. European demand has increased.

Canadian demand is stable. The Canadian marketers indicate that present supplies of finished bison continue to be more than adequate for the next six months.

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

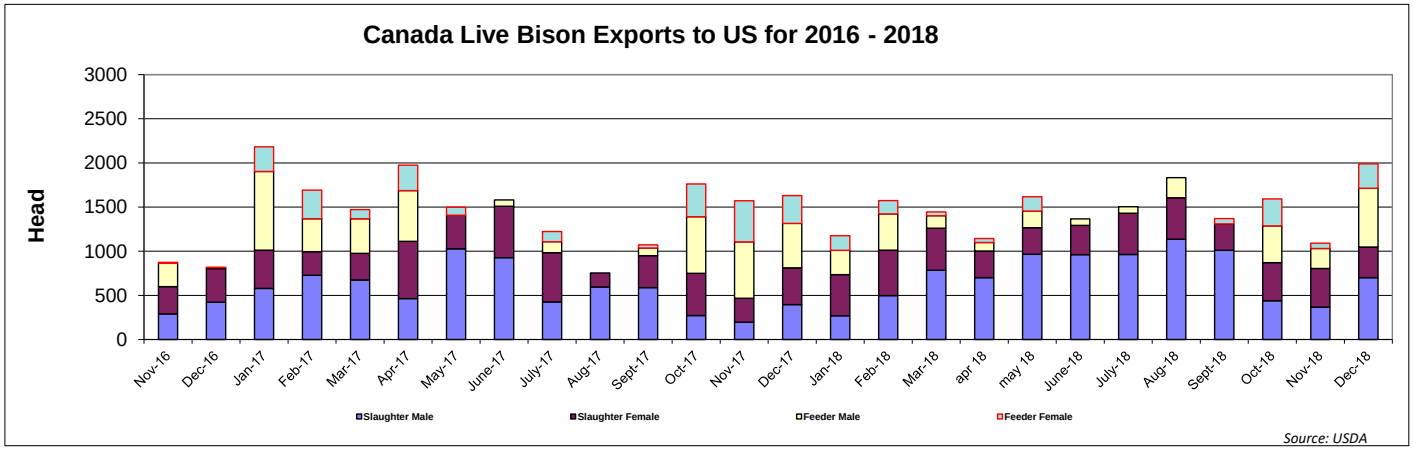
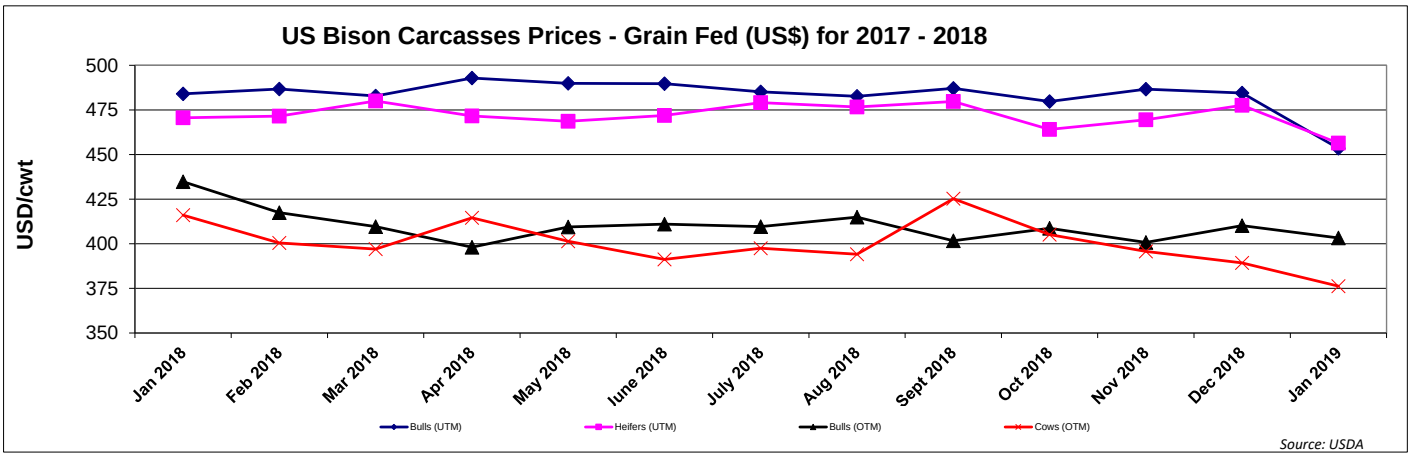


Chart 2



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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