Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - May 28, 2019.

Weekly Federal Bison Slaughter

	6-Apr	13-Apr	20-Apr	27-Apr	April Total	January - April YTD 2019	2018	% Change
Total Canada	*21*	*166*	*98*	*278*	**563**	**2,944**	**3,166**	**-7.0%**
previous year	*263*	*147*	*300*	*128*	***838***			

Provincially Inspected Slaughter

	November 2018	December 2018	January 2019	February 2019	March 2019	March 2018	January - March YTD 2019	2018	% Change
Alberta	38	39	45	31	61	60	137	143	-4.2%
Saskatchewan	13	14	9	10	12	12	31	27	14.8%
Manitoba/BC	22	31	40	38	25	28	103	81	27.2%
Ontario/Quebec**	42	28	29	19	33	28	81	66	22.7%
Total	**115**	**112**	**123**	**98**	**131**	**128**	**352**	**317**	**11.0%**

	YTD 2019	YTD 2018	% Change
Total Canadian Federal and Provincial Slaughter *	**3,296**	**3,483**	**-5.4%**

**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 - March YTD 2019	2018	% Change
Total Slaughter	14,388	14,371	14,186	11,568	10,886	9,995	2,733	2,645	**3.3%**
Total Live Exports	16,769	19,033	26,162	18,364	17,600	17,342	5,274	4,379	**20.4%**
Total Production	**31,157**	**33,404**	**40,348**	**29,932**	**28,486**	**27,316**	**8,007**	**7,024**	**14.0%**

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

US Federal Slaughter*

for week ending:	6-Apr	13-Apr	20-Apr	27-Apr	April Total	January - April YTD 2019	2018	% Change
	1,079	**1,013**	**1,198**	**1,098**	**4,388**	**17,736**	**16,178**	**9.6%**
previous year	*935*	*1,004*	*1,014*	*1,079*	***4,032***			

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

Canada Live Bison Exports to US

	December - 18	January - 19	February - 19	March - 19	April 19	January - April YTD 2019	2018	% Change
Slaughter Male	368	700	648	761	994	3,103	1,947	**59.4%**
Slaughter Female	436	347	177	608	494	1,626	1,872	**-13.1%**
Feeder Male	226	665	500	221	711	2,097	1,331	**57.6%**
Feeder Female	61	278	139	230	721	1,368	675	**102.7%**
Total	**1,091**	**1,990**	**1,464**	**1,820**	**2,920**	**8,194**	**5,825**	**40.7%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		October 2018	November 2018	December 2018	January 2019	February 2019	March 2019	January - March YTD 2019	2018	% Change
USA	Kg	18,124	28,314	22,070	65,489	110,089	57,277	**65,489**	**30,862**	**112.2%**
	Value ($Cdn)	416,698	590,369	325,605	912,749	1,760,963	1,125,887	**912,749**	**532,004**	**71.6%**
France	Kg	7,158	9,150	4,749	3,699	5,363	6,135	**3,699**	**1,104**	**235.1%**
	Value ($Cdn)	216,946	344,996	163,422	110,811	153,875	214,183	**110,811**	**49,244**	**125.0%**
Switzerland	Kg	5,382	3,277	5,056	2,154	5,954	17,420	**2,154**	**3,956**	**-45.6%**
	Value ($Cdn)	158,379	107,658	160,462	61,269	129,292	342,285	**61,269**	**113,847**	**-46.2%**
Netherlands	Kg	-	-	1,580	-	495	1,157	-	**446**	**N/A**
	Value ($Cdn)	-	-	17,293	-	14,122	52,484	-	**18,543**	**N/A**
Mexico	Kg	-	-	-	-	-	9,822	-	-	**N/A**
	Value ($Cdn)	-	-	-	-	-	73,534	-	-	**N/A**
United Kingdom	Kg	56,918	20,021	52,032	17,864	36,440	36,469	**17,864**	-	**N/A**
	Value ($Cdn)	553,834	197,248	510,221	172,642	372,716	369,677	**172,642**	-	**N/A**
Saint Pierre and Miquelon	Kg	4,784	4,877	2,238	5,190	4,564	4,100	**5,190**	**728**	**612.9%**
	Value ($Cdn)	43,109	44,144	23,177	45,501	41,964	41,125	**45,501**	**5,905**	**670.6%**
Other Countries	Kg	211	4,108	5,781	3,415	-	-	**3,415**	-	**N/A**
	Value ($Cdn)	2,145	110,776	160,450	74,416	-	-	**74,416**	-	**N/A**
Total	**Kg**	**92,577**	**69,747**	**93,506**	**97,811**	**162,905**	**132,380**	**393,096**	**155,556**	**152.7%**
	Value ($Cdn)	**1,391,111**	**1,395,191**	**1,360,630**	**1,377,388**	**2,472,932**	**2,219,175**	**6,069,495**	**3,367,765**	**80.2%**

Bone-in		October 2018	November 2018	December 2018	January 2019	February 2019	March 2019	January - March YTD 2019	2018	% Change
Total	**Kg**	**33,359**	**24,056**	**16,235**	**17,191**	**6,745**	**6,743**	**30,679**	**158,398**	**-80.6%**
	Value ($Cdn)	**508,508**	**284,699**	**235,418**	**251,474**	**51,962**	**49,380**	**352,816**	**795,672**	**-55.7%**

Total Exports, Boneless and Bone-in		October 2018	November 2018	December 2018	January 2019	February 2019	March 2019	January - March YTD 2019	2018	% Change
	Kg	**125,936**	**93,803**	**109,741**	**115,002**	**169,650**	**139,123**	**423,775**	**313,954**	**35.0%**
	Value ($Cdn)	**1,899,619**	**1,679,890**	**1,596,048**	**1,628,862**	**2,524,894**	**2,268,555**	**6,422,311**	**4,163,437**	**54.3%**

**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)
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
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

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
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

**source CBA survey of marketers*

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

	February 2019		March 2019		April 2019		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1100-1568	1315.25	1395-1883	1784.06	1413-1895	1633.84	24.2%	-8.4%
Chuckroll/Clod Fresh	620-800	655.76	633-775	700.00	690-875	721.13	10.0%	3.0%
Striploin Fresh	995-1316	1056.48	1025-1877	1469.10	850-1878	1423.59	34.7%	-3.1%
Tenderloin Fresh	2043-2600	2272.19	1900-2436	2158.25	2099-2533	2263.49	-0.4%	4.9%
Ground 90% Bulk, Fresh	600-750	707.46	0	0.00	0	0.00	-	-
Ground 85% Bulk, Frozen	580-804	705.46	580-803	701.88	600-796	705.64	0.0%	0.5%
Ground 85% Patties, Frozen	590-803	697.20	590-920	697.20	610-793	685.94	-1.6%	-1.6%

**source USDA*

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

	Mid-February 2019 Pricing	Mid-March 2019 Pricing	Mid-April 2019 Pricing	Mid-May 2019 Pricing
Tenderloin - Fresh	$51.00 - $62.95	$51.00 - $64.95	$51.00 - $64.95	$51.00 - $55.00
Strip Loin Boneless - Fresh	$30.95 - $36.00	$30.95 - $36.00	$30.95 - $36.00	$33.00 - $36.00
Inside Round - Fresh	$17.95 - $21.40	$17.95 - $21.00	$17.95 - $21.00	$18.95 - $21.40
Ground 90% Bulk Fresh	$18.95 - $19.95	$16.95 - $18.95	$16.95 - $18.95	$16.95 - $18.95
Fresh Bison Trim	$14.95 - $16.00	$14.50 - $17.50	$14.50 - $17.50	$14.50 - $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		$2,600.00 - $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-May, although softer than April prices, were stable. Most new sales were at $5.00 - $5.30 per pound HHW for grade "A" bulls with some previously contracted prices as high as $5.60/lb HHW. 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 $4.90 - $5.00 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 19 weeks of 2019 reached 2,519 head – down 27% from the 3,448 animals slaughtered in 2018 during the same period. Live animal exports to the US for the first three months of 2019 totaled 5,602 head – up 12.7% when compared to the 4,971 bison exported in 2018.

Marketers report that the demand for bison trim has improved as retailers prepare for the summer BBQ season. 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 the Comprehensive Economic Trade Agreement with the European Union in effect since September 21, 2017, demand for bison is increasing with reports of increased interest from protein meat importers. North American demand has increased, with this demand being driven to a great extent by the grilling season.

Canadian demand has shown some increase. A six-week test in Manitoba where A & W is offering bison burgers has created some "buzz." Sobeys, in the provinces of Saskatchewan, has also introduced a bison burger

The Canadian marketers indicate that present supplies of finished bison continue to be more than adequate for the next four 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

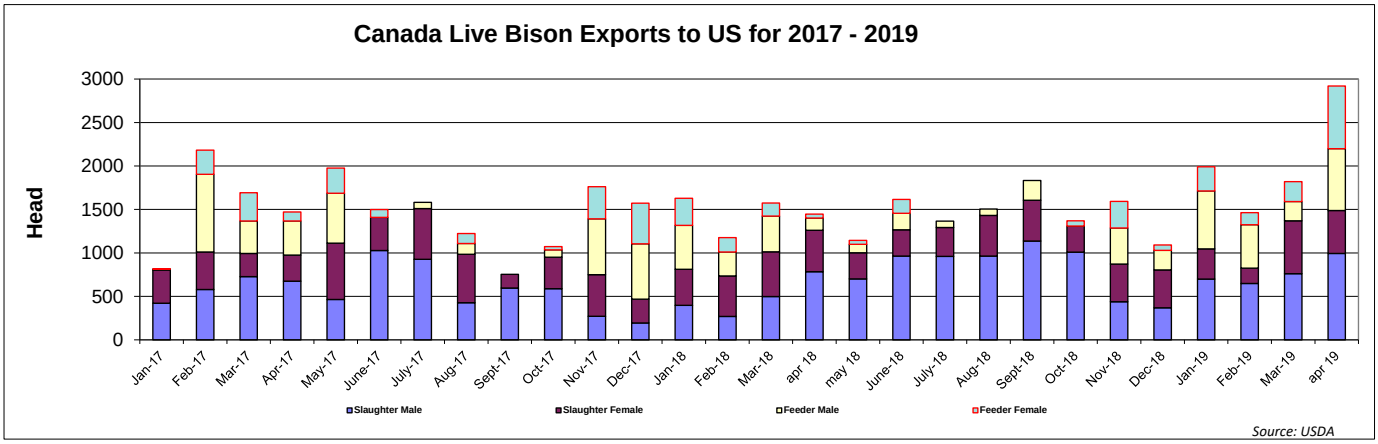
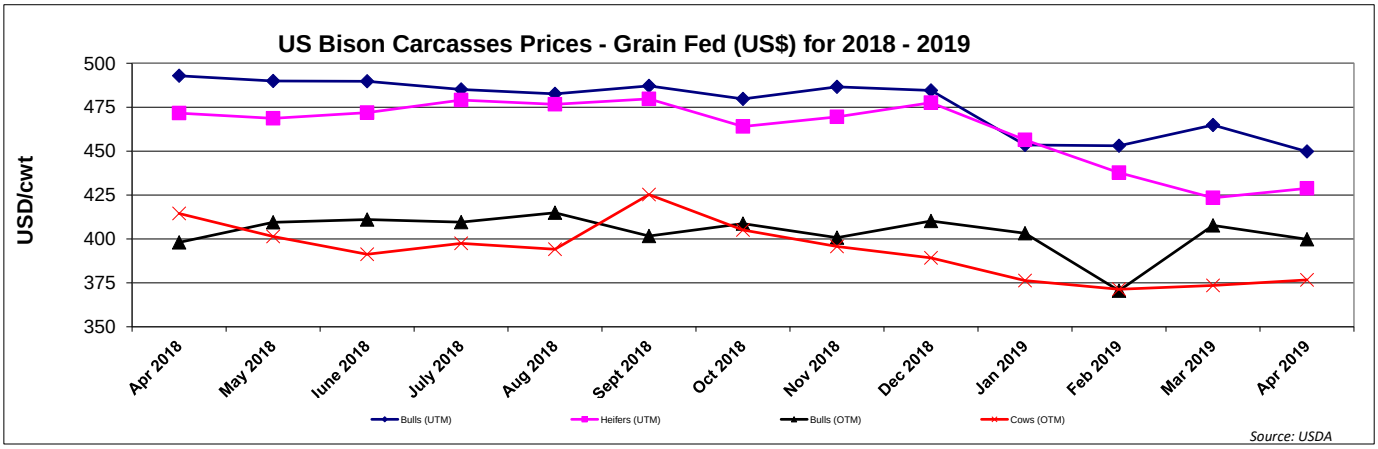


Chart 2



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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