Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - April 30, 2020.

Weekly Federally Inspected Slaughter

	29-Feb	7-Mar	14-Mar	21-Mar	28-Mar	March Total	January - March YTD 2020	2019	% Change
Total Canada	*267*	*304*	*101*	*228*	*142*	**1,042**	**2,474**	**2,381**	**3.9%**
previous year	*356*	*46*	*396*	*52*	*197*	***1,047***			

Provincially Inspected Slaughter

	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	Feb 2019	January - February YTD 2020	2019	% Change
BC / Alberta	43	63	68	98	52	61	150	135	11.1%
Sask / Manitoba	20	29	21	28	24	18	52	42	23.8%
Ontario / Quebec	49	49	25	34	40	29	74	61	21.3%
Canada Total	**112**	**141**	**114**	**160**	**116**	**108**	**276**	**238**	**16.0%**

Note: In order to protect the confidentiality of individual abattoirs, the provincial groupings have changed.

	YTD 2020	YTD 2019	% Change
Total Canadian Federal and Provincial Slaughter *	**2,750**	**2,619**	**5.0%**

**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

	2014	2015	2016	2017	2018	2019	January - February YTD 2020	2019	% Change
Total Slaughter	14,371	14,186	11,568	10,886	10,041	9,499	1,708	1,572	**8.7%**
Total Live Exports	19,033	26,162	18,364	17,600	17,342	20,060	3,482	3,454	**0.8%**
Total Production	**33,404**	**40,348**	**29,932**	**28,486**	**27,383**	**29,559**	**5,190**	**5,026**	**3.3%**

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

US Federal Slaughter*

for week ending:	29-Feb	7-Mar	14-Mar	21-Mar	28-Mar	March Total	January - March YTD 2020	2019	% Change
	997	**1,063**	**1,179**	**1,589**	**1,457**	**6,285**	**15,048**	**13,348**	**12.7%**
previous year	*1,096*	*1,074*	*1,033*	*1,131*	*1,076*	***5,410***			

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

Canada Live Bison Exports to US

	November - 19	December - 19	January - 20	February - 20	March - 20	January - March YTD 2020	2019	% Change
Slaughter Male	614	591	712	681	508	1,901	2,109	**-9.9%**
Slaughter Female	437	398	350	650	757	1,757	1,132	**55.2%**
Feeder Male	0	0	188	487	579	1,254	1,386	**-9.5%**
Feeder Female	0	0	101	313	252	666	647	**2.9%**
Total	**1,051**	**989**	**1,351**	**2,131**	**2,096**	**5,578**	**5,274**	**5.8%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		Sept 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	January - February YTD 2020	2019	% Change
United States	Kg	22,652	29,095	46,719	56,592	46,884	37,346	**84,230**	**175,578**	**-52.0%**
	Value ($Cdn)	353,731	479,471	649,271	714,996	680,628	299,362	**979,990**	**2,673,666**	**-63.3%**
France	Kg	-	-	2,632	382	692	44	**736**	**9,062**	**-91.9%**
	Value ($Cdn)	-	-	79,612	12,912	30,327	2,289	**32,616**	**264,686**	**-87.7%**
Switzerland	Kg	1,148	1,501	1,329	2,923	574	1,068	**1,642**	**8,108**	**-79.7%**
	Value ($Cdn)	50,887	56,032	52,330	136,822	25,236	47,789	**73,025**	**190,561**	**-61.7%**
	Kg	5,421	-	-	-	-	-	**-**	**9,754**	**-**
Saint Pierre and Miquelon	Value ($Cdn)	49,277	-	-	-	-	-	**-**	**87,465**	**-**
Germany	Kg	27,835	-	-	-	-	-	**-**	**54,304**	**-**
	Value ($Cdn)	284,327	-	-	-	-	-	**-**	**545,358**	**-**
Mexico	Kg	17,148	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	157,369	-	-	-	-	-	**-**	**-**	**-**
Netherlands	Kg	205	3,288	3,631	1,548	876	-	**876**	**495**	**77.0%**
	Value ($Cdn)	2,914	96,268	112,040	65,438	33,339	-	**33,339**	**14,122**	**136.1%**
Other Countries	Kg	40,283	5,273	5,141	3,278	718	1,949	**2,667**	**3,415**	**-21.9%**
	Value ($Cdn)	535,177	153,414	151,839	91,684	31,143	67,716	**98,859**	**74,416**	**32.8%**
Total	**Kg**	**114,692**	**39,157**	**59,452**	**64,723**	**49,744**	**40,407**	**90,151**	**260,716**	**-65.4%**
	Value ($Cdn)	**1,433,682**	**785,185**	**1,045,092**	**1,021,852**	**800,673**	**417,156**	**1,217,829**	**3,850,274**	**-68.4%**

Bone-in		Sept 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	January - February YTD 2020	2019	% Change
Total	**Kg**	**7,672**	**7,409**	**11,688**	**6,467**	**1,667**	**63,879**	**65,546**	**23,936**	**173.8%**
	Value ($Cdn)	**56,656**	**52,355**	**85,562**	**54,044**	**17,502**	**655,936**	**673,438**	**303,436**	**121.9%**

Total Exports, Boneless and Bone-in		Sept 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	January - February YTD 2020	2019	% Change
	Kg	**122,364**	**46,566**	**71,140**	**71,190**	**51,411**	**104,286**	**155,697**	**284,652**	**-45.3%**
	Value ($Cdn)	**1,490,338**	**837,540**	**1,130,654**	**1,075,896**	**818,175**	**1,073,092**	**1,891,267**	**4,153,710**	**-54.5%**

**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)
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
Jan 2020	415.16	390.24	346.38	336.09
Feb 2020	407.21	398.16	346.48	337.96
Mar 2020	408.09	403.90	349.59	340.84

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Feb 2020	425-525	400-490	300-350	300-350
Mar 2020	425-525	400-490	300-350	300-350
Apr 2020	400-450	375-400	300-350	300-350

**source CBA survey of marketers*

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

	January 2020		February 2020		March 2020		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,305-1,516	1,313.54	1,272-1,500	1,284.19	1,272-1,500	1,299.55	-1.1%	1.2%
Chuckroll/Clod Fresh	620-770	660.10	620-700	697.76	630-650	638.13	-3.3%	-8.5%
Striploin Fresh	1,054-1,100	1,061.05	1,040-1,100	1,044.51	1,048-1,100	1,049.65	-1.1%	0.5%
Tenderloin Fresh	1,995-2,351	2,092.25	2,027-2,311	2,126.25	1,982-2,311	2,113.13	1.0%	-0.6%
Grnd 85% Bulk, Frozen	645-998	753.00	550-757	643.28	545-757	639.25	-15.1%	-0.6%
Grnd 85% Patties, Fresh	640-760	751.92	N/A	N/A	N/A	N/A	N/A	N/A
Grnd 85% Patties, Frozen	565-765	689.04	560-763	669.48	560-763	687.46	-0.2%	2.7%

**source USDA*

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

	Mid-January 2020 Pricing	Mid-February 2020 Pricing	Mid-March 2020 Pricing	Mid-April 2020 Pricing
Tenderloin - Fresh	$50.00 - $55.00	$50.00 - $55.00	$50.00 - $55.00	$50.00 - $56.90
Strip Loin Boneless - Fresh	$33.00 - $36.00	$33.00 - $36.00	$33.00 - $36.00	$27.50 - $33.00
Inside Round - Fresh	$19.00 - $20.00	$19.00 - $20.00	$19.00 - $20.00	$19.00 - $19.25
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 - $16.50	$11.95 - $16.50	$11.95 - $16.50	$11.95 - $14.25

**source CBA survey of marketers*

Live Auction Reports *most recently reported; may not reflect current market

Jack Auction Group (SK) (March 28, 2020)
Head Sold: 924 ("CABIN FEVER" VIDEO BISON SALE)

Class	# of head	Average/PD
2018 Bull Yrlg Cross 900	60	2.41
2018 Bull Yrlg Cross 750	75	2.40
2018 Bull Yrlg Plains 650	13	2.02
2018 Heifer Yrlg Cross 800	16	2.11
2018 Heifer Yrlg Cross 700	15	2.48
2018 Heifer Yrlg Cross 700	15	2.42
2018 Heifer Yrlg Cross 700	15	2.42
2018 Heifer Yrlg Cross 750	75	1.94
2018 Heifer Yrlg Cross 650	15	1.60
2018 Heifer Yrlg Plains 575	18	1.50
2018 Mixed Yrlg Cross 750	22	1.60
2018 Mixed Yrlg Plains 625	15	1.55
OTM Heifer Feeder Plains 750	28	1.60
2019 Bull Calves Plains 500	14	1.94
2019 Heifer Calves Plains 475	9	1.75
2019 Bull Calves Plains 535	37	2.28
2019 Heifer Calves Plains 510	20	2.29
2019 Heifer Calves Plains 435	24	2.03
2019 Mixed Calves Cross 450	180	2.00
2019 Heifer Calves Cross 460	125	1.90
2018 Heifer Calves Plains 425	57	1.96
2019 Bull Calves Plains 510	19	2.06
2019 Bull Calves Plains 485	12	2.10
2019 Heifer Calves Plains 435	13	1.90
2019 Mixed Calves Cross 450	16	1.60
2019 Mixed Calves Plains 435	14	1.83
2017 Bulls 2017 Wood 1050	2	2.60

Ritchie Bros. Auctioneers (SK) (March 11, 2020)
Head Sold: 496 Cloverleaf Bison Auction

Class	# of head	Average/PD
2019 Bulls (600 lbs plus)	7	2.26
2019 Bulls (500-599lbs)	107	2.27
2019 Bulls (400-499lbs)	99	2.18
2019 Bulls (300-399lbs)	19	2.00
2018 Yearling Bulls (800 lbs plus)	6	2.42
2018 Yearling Bulls (700-799lbs)	9	1.83
2018 Yearling Bulls (600-699lbs)	8	1.68
2018 Yearling Bulls (under 600lbs)	3	2.27
2017 Bulls (1100-1199 lbs)	4	2.31
2019 Heifers (500-550 lbs)	88	2.08
2019 Heifers (400-499lbs)	34	2.76
2019 Heifers (300-399lbs)	34	1.77
2018 Heifers (800 lbs plus)	10	2.21
2018 Heifers (700-799 lbs)	27	1.67
2018 Heifers (600-699 lbs)	24	1.69
2018 Heifers (under 600lbs)	9	0.98
2017 Bred Heifers (Preg Tested)	3	1.4
920 - 930 lbs		
Mature Cows (Open) 825 - 870 lbs	5	0.63

Jack Auction Group (SK) (February 22, 2020)
Head Sold: 923 (Video Bison Auction)

Class / # of head	Average/PD
2018 Bull Yearlings - 750 / 28 hd	2.33
2018 Bull Yearlings - 825 / 24 hd	2.12
2018 Bull Yearlings - 900 / 70 hd	2.50
2018 Heifer Yearlings - 650 / 45 hd	1.86
2018 Heifer Yearlings - 750 / 16 hd	1.87
2019 Bull Calves - 550 / 50 hd	2.36
2019 Bull Calves - 450 / 20 hd	2.45
2019 Bull Calves - 500 / 16 hd	2.40
2019 Bull Calves - 500 / 12 hd	2.72
2019 Bull Calves - 575 / 110 hd	2.57
2019 Bull Calves - 575 / 110 hd	2.57
2019 Mixed Calves - 525 / 12 hd	2.43
2019 Heifer Calves - 550 / 25 hd	2.65
2019 Heifer Calves - 400 / 20 hd	2.04
2019 Heifer Calves - 450 / 50 hd	2.00
2019 Heifer Calves - 450 / 10 hd	2.19
2019 Heifer Calves - 450 / 10 hd	2.19
2019 Heifer Calves - 450 / 10 hd	2.10
2019 Heifer Calves - 450 / 15 hd	2.03
2019 Heifer Calves - 460 / 25 hd	2.47
2019 Heifer Calves - 450 / 16 hd	2.71
2019 Heifer Calves - 400 / 95 hd	1.98
Young Bred Cows - 1150 / 45 hd	$4,385
Aged Bred Cows - 1150 / 16 hd	$3,600
2017 Bred Heifers - 1200 / 16 hd	$4,175

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

Bison prices to mid-April reflected the impact of COVID-19 on the food service marketplace in both North America and Europe. With the restaurant closures, marketers serving that marketplace began the process of pivoting to serve the retail food space. Prices remained stronger in the US as the industry was able to take advantage of the strong demand for red meat. In Canada, with increasing inventories of bison meat, reports indicated fewer animals were coming to the marketplace as marketers are not prepared to carry increased inventory. This has also resulted in a problematic build-up of market-ready animals on farms. As slaughter capacity is made available, prices offered by Canadian buyers for slaughter in Canada ranged from $4.00 – $4.50/lb HHW for Grade "A" bison. Heifers are priced at about 25 cents lower. Demand for mature bulls was very soft as select processors will no longer harvest herd bulls.

Canadian buyers purchasing bulls for slaughter in the U.S. market are paying between CDN $5.00 - $5.25/lb HHW when slaughter dates are available. Heifers are priced at about 25 cents lower. Carcasses that do not fall within buyers' specifications may be discounted. Final returns need adjustment for quality, transportation, and export costs.

U.S. buyers are offering US $3.60 - 4.15/lb HHW for prime bulls from Canada for slaughter in the U.S. They are offering US $3.40 – $ 3.90/lb for heifers. Returns to the producers are dependent on exchange rates, quality, transportation, and export costs.

Older cows are being priced at CDN $3.00 - $3.50 HHW in Canada.

Federal slaughter for the first three months of 2020 totaled 2,474 head, which is up 3.9% compared to the 2019 slaughter of 2,381 head for the same period. However the month of April has shown a much more dramatic story, with a decline in live animal slaughter of 81% from 563 animals in 2019 to 105 animals in 2020 for a comparable period reflecting the disruption created by Covid-19. Live animal exports to the US for the first three months of 2020 totaled 5,578 head; up 5.8% when compared to the 5,274 bison exported for the same period in 2019.

Marketers report that the inventory of all cuts is increasing and that kill numbers have declined to minimize inventory build-up. The demand for trim is soft. Growth in demand for the grilling season is dependent upon the rate at which the economy begins to reopen. The demand for trim products in the US is strong.

European demand has dropped by over 80% due to the non-existent food services marketplace and the substantial increase in freight rates.

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

Prices for bison products are expected to be soft in the Canadian marketplace until select marketers are able to shift from food service to the retail space. The US market (for a limited number of Canadian animals) will remain stronger than the Canadian marketplace. Returns to Canadian producers shipping to the US will fluctuate as the value of the Canadian dollar changes. Market uncertainty is expected to continue as the world adjusts to the realities of COVID-19.

Chart 1

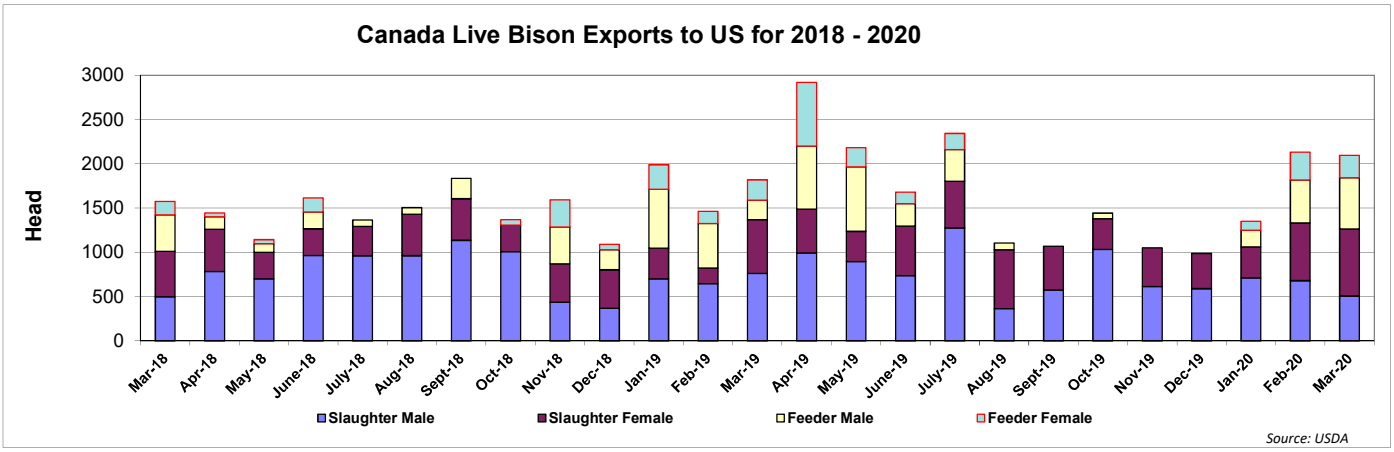
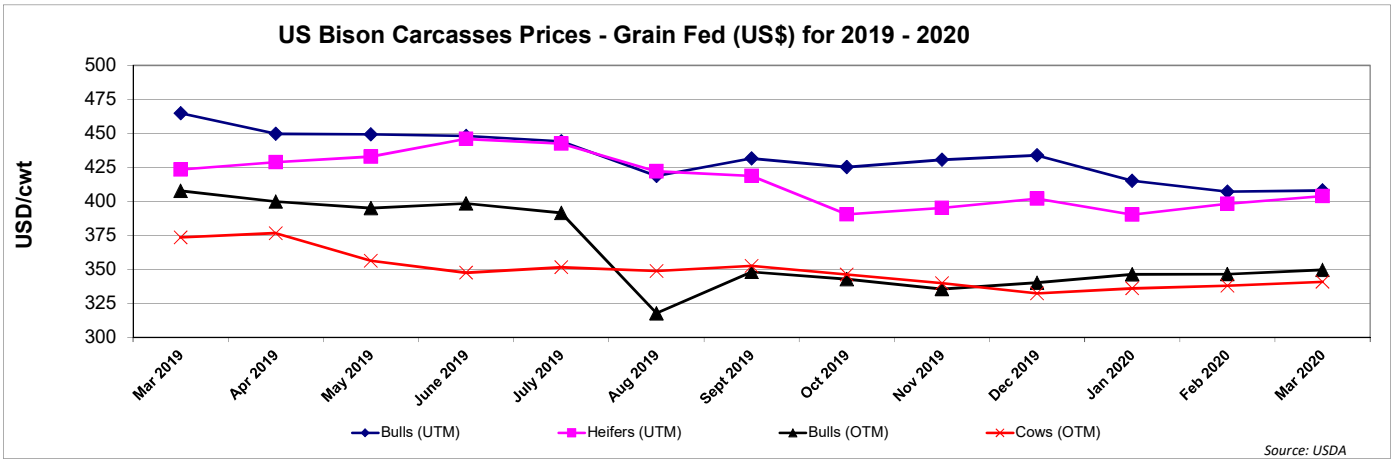


Chart 2



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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