Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

# BISON MARKET AND SUPPLY UPDATE

***Prepared by Red Meat Section/Agriculture and Agri-Food Canada - June 29, 2020.***

## Weekly Federally Inspected Slaughter

| | 2-May | 9-May | 16-May | 23-May | May Total | January - May YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|
| **Total Canada** | *2* | *54* | *2* | *185* | **243** | **2,822** | **3,543** | **-20.3%** |
| ***previous year*** | *44* | *222* | *91* | *242* | ***599*** | | | |

## Provincially Inspected Slaughter

| | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | Apr 2019 | January - April YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **BC / Alberta** | 68 | 98 | 52 | 64 | 88 | 49 | 302 | 257 | 17.5% |
| **Sask / Manitoba** | 21 | 28 | 24 | 31 | 44 | 31 | 127 | 103 | 23.3% |
| **Ontario / Quebec** | 25 | 34 | 40 | 32 | 41 | 24 | 147 | 128 | 14.8% |
| **Canada Total** | **114** | **160** | **116** | **127** | **173** | **104** | **576** | **488** | **18.0%** |

*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 *** | **3,398** | **4,031** | **-15.7%** |

**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 - April YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **Total Slaughter** | 14,371 | 14,186 | 11,568 | 10,886 | 10,041 | 9,585 | 3,155 | 3,432 | **-8.1%** |
| **Total Live Exports** | 19,033 | 26,162 | 18,364 | 17,600 | 17,342 | 20,060 | 9,047 | 8,194 | **10.4%** |
| **Total Production** | **33,404** | **40,348** | **29,932** | **28,486** | **27,383** | **29,645** | **12,202** | **11,626** | **5.0%** |

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

## US Federal Slaughter*

| for week ending: | 2-May | 9-May | 16-May | 23-May | May Total | January - May YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|
| | **1,368** | **1,477** | **1,299** | **1,269** | **5,413** | **25,400** | **21,724** | **16.9%** |
| ***previous year*** | *940* | *1,105* | *977* | *966* | ***3,988*** | | | |

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

## Canada Live Bison Exports to US

| | January - 20 | February - 20 | March - 20 | April - 20 | May - 20 | January - May YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|
| Slaughter Male | 712 | 681 | 508 | 1,121 | 806 | 3,828 | 3,999 | **-4.3%** |
| Slaughter Female | 350 | 650 | 757 | 743 | 493 | 2,993 | 1,968 | **52.1%** |
| Feeder Male | 188 | 487 | 579 | 1,034 | 225 | 2,513 | 2,825 | **-11.0%** |
| Feeder Female | 101 | 313 | 252 | 571 | 700 | 1,937 | 1,585 | **22.2%** |
| Total | **1,351** | **2,131** | **2,096** | **3,469** | **2,224** | **11,271** | **10,377** | **8.6%** |

**source : USDA, APHIS*

## Canadian Fresh or Chilled Bison Meat Exports

| ***Boneless*** | | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | January - April YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **United States** | Kg | 46,719 | 56,592 | 46,884 | 37,346 | 25,877 | 293 | **110,400** | **276,018** | **-60.0%** |
| | Value ($Cdn) | 649,271 | 714,996 | 680,628 | 299,362 | 403,313 | 13,942 | **1,397,245** | **4,643,710** | **-69.9%** |
| **France** | Kg | 2,632 | 382 | 692 | 44 | 1,525 | 663 | **2,924** | **17,482** | **-83.3%** |
| | Value ($Cdn) | 79,612 | 12,912 | 30,327 | 2,289 | 48,987 | 15,912 | **97,515** | **562,555** | **-82.7%** |
| **Switzerland** | Kg | 1,329 | 2,923 | 574 | 1,068 | 873 | - | **2,515** | **27,037** | **-90.7%** |
| | Value ($Cdn) | 52,330 | 136,822 | 25,236 | 47,789 | 40,321 | - | **113,346** | **577,567** | **-80.4%** |
| | Kg | - | - | - | - | - | 142 | **142** | **20,659** | **-99.3%** |
| **Saint Pierre and Miquelon** | Value ($Cdn) | - | - | - | - | - | 2,103 | **2,103** | **203,195** | **-99.0%** |
| **Germany** | Kg | - | - | - | - | - | - | **-** | **108,944** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **1,110,606** | **N/A** |
| **Mexico** | Kg | - | - | - | - | - | - | **-** | **30,278** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **250,263** | **N/A** |
| **Netherlands** | Kg | 3,631 | 1,548 | 876 | - | 1,260 | - | **2,136** | **2,105** | **1.5%** |
| | Value ($Cdn) | 112,040 | 65,438 | 33,339 | - | 29,173 | - | **62,512** | **79,520** | **-21.4%** |
| **Other Countries** | Kg | 5,141 | 3,278 | 718 | 1,949 | 795 | - | **3,462** | **16,800** | **-79.4%** |
| | Value ($Cdn) | 151,839 | 91,684 | 31,143 | 67,716 | 28,705 | - | **127,564** | **286,031** | **-55.4%** |
| **Total** | **Kg** | **59,452** | **64,723** | **49,744** | **40,407** | **30,330** | **1,098** | **121,579** | **499,323** | **-75.7%** |
| | **Value ($Cdn)** | **1,045,092** | **1,021,852** | **800,673** | **417,156** | **550,499** | **31,957** | **1,800,285** | **7,713,447** | **-76.7%** |

| ***Bone-in*** | | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | January - April YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total** | **Kg** | **11,688** | **6,467** | **1,667** | **59,466** | **599** | **337** | **62,069** | **39,410** | **57.5%** |
| | **Value ($Cdn)** | **85,562** | **54,044** | **17,502** | **624,400** | **6,292** | **3,539** | **651,733** | **426,805** | **52.7%** |

| ***Total Exports, Boneless and Bone-in*** | | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | January - April YTD 2020 | 2019 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| | **Kg** | **71,140** | **71,190** | **51,411** | **99,873** | **30,929** | **1,435** | **183,648** | **538,733** | **-65.9%** |
| | **Value ($Cdn)** | **1,130,654** | **1,075,896** | **818,175** | **1,041,556** | **556,791** | **35,496** | **2,452,018** | **8,140,252** | **-69.9%** |

**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) |
|---|---|---|---|---|
| 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 |
| Apr 2020 | 396.56 | 378.99 | 340.26 | 341.21 |
| May 2020 | 392.40 | 376.11 | 343.62 | 343.42 |

**source USDA*

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

*wghtd avg*

| | Bulls | Heifers | Mature Bulls | Mature Cows |
|---|---|---|---|---|
| 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 |
| May 2020 | 350-450 | 350-425 | 250-300 | 250-300 |
| June 2020 | 350-400 | 350-375 | 250-300 | 250-300 |

**source CBA survey of marketers*

**For the U.S.Market**

| | Bulls | Heifers |
|---|---|---|
| June 2020 | 500 | 480 |

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

| | March 2020 | | April 2020 | | May 2020 | | % Change Current Month vs. 2 mnths prior | % Change Current Month vs. 1 month prior |
|---|---|---|---|---|---|---|---|---|
| | Range | Wt. Avg | Range | Wt. Avg | Range | Wt. Avg | | |
| Ribeye Lip-On Fresh | 1,272-1,500 | 1,299.55 | 1,240-1,249 | 1,241.21 | 1,216-1,367 | 1,218.07 | -6.3% | -1.9% |
| Chuckroll/Clod Fresh | 630-650 | 638.13 | 650-663 | 662.83 | 638-650 | 638.58 | 0.1% | -3.7% |
| Striploin Fresh | 1,048-1,100 | 1,049.65 | 899-1,089 | 1,081.78 | 1,057-1,112 | 1,058.75 | 0.9% | -2.1% |
| Tenderloin Fresh | 1,982-2,311 | 2,113.13 | 1,851-2,217 | 1,887.41 | N/A | N/A | N/A | N/A |
| Grnd 85% Bulk, Frozen | 545-757 | 639.25 | 560-779 | 749.54 | 560-766 | 620.19 | -3.0% | -17.3% |
| Grnd 85% Patties, Fresh | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Grnd 85% Patties, Frozen | 560-763 | 687.46 | 575-765 | 759.42 | 570-741 | 678.20 | -1.3% | -10.7% |

**source USDA*

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

| | Mid-March 2020 Pricing | Mid-April 2020 Pricing | Mid-May 2020 Pricing | Mid-June 2020 Pricing |
|---|---|---|---|---|
| Tenderloin - Fresh | $50.00 - $55.00 | $50.00 - $56.90 | $50.00 - $56.90 | $50.00 - $56.90 |
| Strip Loin Boneless - Fresh | $33.00 - $36.00 | $27.50 - $33.00 | $27.50 - $33.00 | $27.50 - $33.00 |
| Inside Round - Fresh | $19.00 - $20.00 | $19.00 - $19.25 | $19.00 - $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 - $16.50 | $11.95 - $14.25 | $11.95 - $14.50 | $11.95 - $14.50 |

**source CBA survey of marketers*

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

**Jack Auction Group (SK) (June 1, 2020)**
***Head Sold: 94***

| Class | # of head | Average/lb |
|---|---|---|
| 2018 Bull Yrlg Cross (1,075 Base) | 48 | 2.26 |
| 2018 Bull Yrlg Cross (975 Base) | 35 | 2.21 |
| 2018 Bull Yrlg Cross (1,000 Base) | 11 | 2.21 |

**Ritchie Bros. Auctioneers (SK) (May 6, 2020)**
***Head Sold: 338 (Back to Grass Auction)***

| Class | # of head | Average/lb |
|---|---|---|
| 2019 Bulls (600 lbs plus) | 27 | 2.38 |
| 2019 Bulls (550-599lbs) | 34 | 2.45 |
| 2019 Bulls (500-549lbs) | 32 | 2.44 |
| 2019 Bulls (400-499lbs) | 27 | 2.08 |
| 2019 Bulls (300-399lbs) | 25 | 1.62 |
| 2018 Semen Tested Bulls (950-1150lbs) | 4 | 2.34 |
| 2018 Feeder Bulls (850 lbs plus) | 7 | 2.26 |
| 2018 Feeder Bulls (under 850 lbs) | 6 | 1.87 |
| 2017 Bulls (over 1000 lbs) | 1 | 2.42 |
| 2017 Bulls (under 1000 lbs) | 2 | 2.52 |
| 2019 Heifers (550 lbs plus) | 30 | 2.22 |
| 2019 Heifers (500-549lbs) | 41 | 2.35 |
| 2019 Heifers (450-499lbs) | 33 | 2.07 |
| 2019 Heifers (400-449lbs) | 22 | 1.75 |
| 2019 Heifers (under 400 lbs) | 31 | 1.42 |
| 2018 Heifers (800 lbs plus) | 5 | 2.86 |
| 2018 Heifers (700-799 lbs) | 3 | 1.55 |
| 2018 Heifers (under 700 lbs) | 6 | 1.42 |
| 2017 Heifers (775-975 lbs) | 2 | 1.60 |

**Jack Auction Group (SK) (May 2, 2020)**
***Head Sold: 382 (Video Bison Auction)***

| Class / # of head | # of head | Average/lb |
|---|---|---|
| 2018 Bull Yearlings - 925 | 16 | 2.46 |
| 2018 Bull Yearlings - 875 | 16 | 2.19 |
| 2018 Bull Yearlings - 1,025 | 62 | 2.44 |
| 2017 Bull Fats - 1,100 | 5 | 1.96 |
| 2018 Heifer Yearlings - 750 | 50 | 1.78 |
| 2018 Heifer Yearlings - 740 | 20 | 1.71 |
| 2017 Heifer Yearlings - 900 | 13 | 1.70 |
| 2019 Bull Calves - 550 | 18 | 2.73 |
| 2019 Bull Calves - 400 | 17 | 1.73 |
| 2019 Mixed Calves - 475 | 80 | 1.65 |
| 2019 Bull Calves - 520 | 19 | 1.91 |
| 2019 Heifer Calves - 460 | 14 | 1.60 |
| 2019 Mixed Calves - 350 | 15 | 1.96 |
| 2018 Heifer Yearlings - 550 | 8 | 1.45 |
| 2019 Bull Yearlings - 725 | 7 | 1.50 |
| 2018 Repl Heifers - 900 | 20 | $1,775.00 |
| 2018 Breeding Bull - 1,200 | 1 | $3,000.00 |
| 2015 Mature Bull - 1,800 | 1 | 1.90 |

**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-June in Canada reflected the continued impact of COVID-19 on the food service marketplace in North America and Europe. Prices remained stronger in the US as the industry was able to take advantage of the strong retail demand for red meats. In Canada, with the increasing inventories of bison meat, reports indicated fewer animals were being slaughtered as marketers are not prepared to carry increased meat inventory. This has resulted in a problematic build-up of market-ready bison on farms. Combined Federal and Provincial Government assistance through AgriRecovery in some regions in Canada, will assist in covering the cost of feed until bison are slaughtered. Also, participation by bison marketers in the Food Surplus Rescue Program will be helpful in reducing the excess inventories created by COVID-19.

From January 1st to June 20, 2020 3,092 bison were slaughtered in federally-inspected plants in Canada; this is 1,088 or 26% below the 4,180 slaughtered during the same time period in 2019.

With the impact of COVID-19, Canadian bison slaughter from April 4, 2020 to June 20, 2020 at 618 head is down 66% compared to the 1,799 head slaughtered during the same period in 2019. Low demand for bison products in the domestic and European market, combined with limited available slaughter spaces for bison, will continue to keep Canadian bison slaughter at current levels. With the reduction in Canadian slaughter, the inventory of market-ready bison continues to increase, having a negative impact on producer cash flows and prices.

Live animal exports to the US during the first five months of 2020 totaled 11,271 head – up 8.6% when compared to the 10,377 bison exported during the same period in 2019. Total exports of live bison and bison meat to the US in 2020 are about $2.4 million below the 2019 levels for the first quarter.

Prices offered by Canadian buyers for slaughter in Canada range between $3.50 - $4.00/lb HHW for Grade "A" bison on light trading. Heifers are priced at similar levels, again on light trading. Canadian buyers purchasing bulls for slaughter in the US market are paying $5.00/lb Canadian HHW when slaughter dates are available. Heifers are priced at about 20 cents lower. Carcasses that do not fall within buyers' specifications may be discounted. Final returns need adjustment for quality, transportation, and export costs.

US buyers are offering $3.85/lb US HHW for prime bulls from Canada for slaughter in the US. They are offering $3.60/lb US for heifers. Returns to the producers are dependent on exchange rates, quality, transportation, and export costs.

European demand has dropped by over 80% due to the non-existent food service marketplaces and the substantial increase in freight rates. As the European economy recovers, the bison industry should be positively influenced. There are reports of increased exports to Europe.

The rate at which the economy and the restaurant trade begins to recover will influence the demand for bison. The shift of domestic marketers from food service to retail should have a positive impact on demand and prices. There has been some product purchase to support summer demand. Bison trim and ground is still burdensome for some marketers in Canada.

The US market continues to be much stronger than the Canadian market. Although the demand for ground and trim is strong, there has been some build-up of middle cuts for some marketers.

Market uncertainty is expected to continue as the world adjusts to the realities of COVID-19.

**Chart 1**

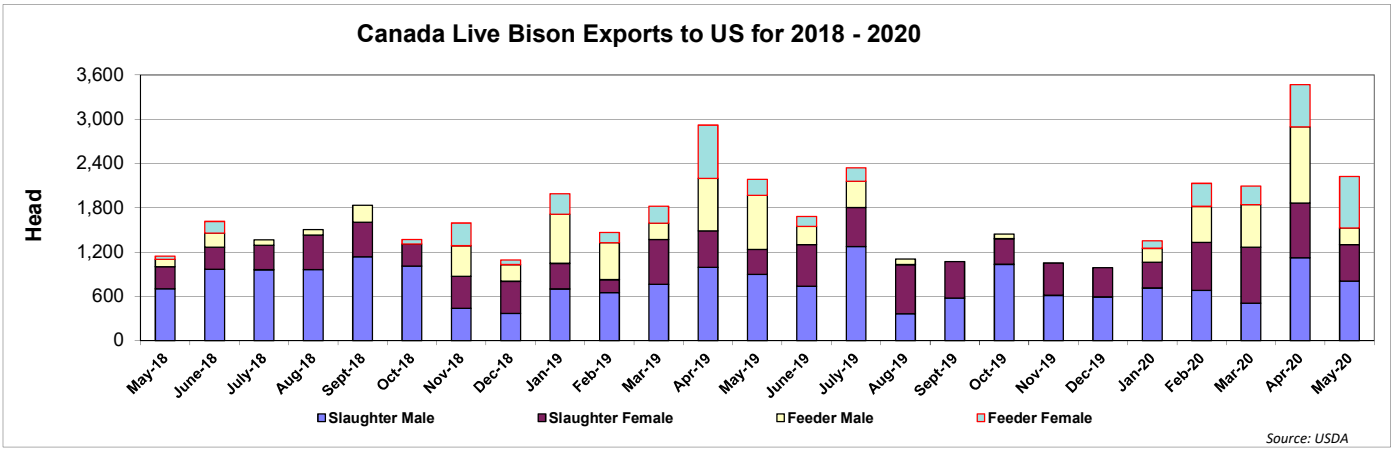
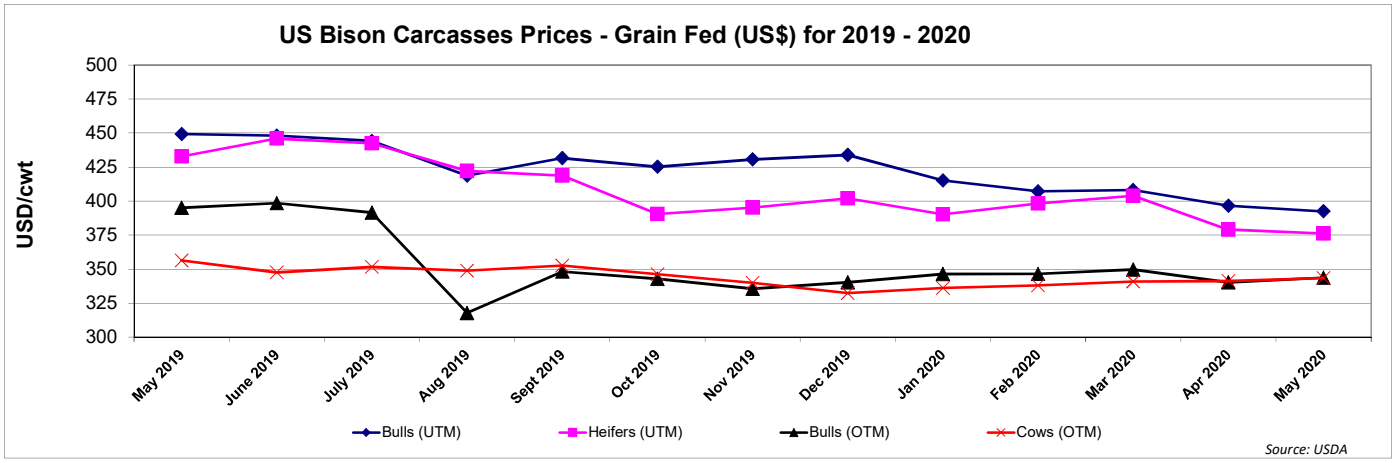



**Chart 2**




**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