Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - August 25, 2020.

Weekly Federally Inspected Slaughter

	4-Jul	11-Jul	18-Jul	25-Jul	July Total	January - July YTD 2020	2019	% Change
Total Canada	*63*	*134*	*104*	*111*	**412**	**3,595**	**4,828**	**-25.5%**
previous year	*203*	*119*	*182*	*98*	***602***			

Provincially Inspected Slaughter

	Feb 2020	Mar 2020	Apr 2020	May 2020	June 2020	June 2019	January - June YTD 2020	2019	% Change
BC / Alberta	52	73	88	75	96	52	482	370	30.3%
Sask / Manitoba	24	31	44	34	67	29	228	153	49.0%
Ontario / Quebec	40	32	41	34	42	61	223	227	-1.8%
Canada Total	**116**	**136**	**173**	**143**	**205**	**142**	**933**	**750**	**24.4%**

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 *	**4,528**	**5,578**	**-18.8%**

**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 - June YTD 2020	2019	% Change
Total Slaughter	14,371	14,186	11,568	10,886	10,041	9,585	4,116	4,976	**-17.3%**
Total Live Exports	19,033	26,162	18,364	17,600	17,342	20,060	13,443	12,058	**11.5%**
Total Production	**33,404**	**40,348**	**29,932**	**28,486**	**27,383**	**29,645**	**17,559**	**17,034**	**3.1%**

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

US Federal Slaughter*

for week ending:	4-Jul	11-Jul	18-Jul	25-Jul	July Total	January - July YTD 2020	2019	% Change
	1,203	**1,144**	**1,341**	**1,124**	**4,812**	**36,122**	**31,191**	**15.8%**
previous year	*886*	*1,065*	*967*	*1,075*	***3,993***			

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

Canada Live Bison Exports to US

	March - 20	April - 20	May - 20	June - 20	July - 20	January - July YTD 2020	2019	% Change
Slaughter Male	508	1,121	806	1,306	1,402	6,536	6,010	**8.8%**
Slaughter Female	757	743	493	495	506	3,994	3,058	**30.6%**
Feeder Male	579	1,034	225	161	0	2,674	3,434	**-22.1%**
Feeder Female	252	571	700	210	0	2,147	1,899	**13.1%**
Total	**2,096**	**3,469**	**2,224**	**2,172**	**1,908**	**15,351**	**14,401**	**6.6%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	June 2020	January - June YTD 2020	2019	% Change
United States	Kg	46,884	37,346	25,877	293	790	19,038	**130,228**	**354,111**	**-63.2%**
	Value ($Cdn)	680,628	299,362	403,313	13,942	24,084	267,209	**1,688,538**	**5,900,540**	**-71.4%**
France	Kg	692	44	1,525	663	690	625	**4,239**	**21,688**	**-80.5%**
	Value ($Cdn)	30,327	2,289	48,987	15,912	8,278	12,024	**117,817**	**705,422**	**-83.3%**
Switzerland	Kg	574	1,068	873	-	-	754	**3,269**	**30,046**	**-89.1%**
	Value ($Cdn)	25,236	47,789	40,321	-	-	34,946	**148,292**	**707,786**	**-79.0%**
	Kg	-	-	-	142	-	-	**142**	**31,715**	**-99.6%**
Saint Pierre and Miquelon	Value ($Cdn)	-	-	-	2,103	-	-	**2,103**	**302,551**	**-99.3%**
Germany	Kg	-	-	-	-	-	-	**-**	**112,161**	**N/A**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**1,145,123**	**N/A**
Mexico	Kg	-	-	-	-	-	-	**-**	**44,537**	**N/A**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**352,129**	**N/A**
Netherlands	Kg	876	-	1,260	-	-	-	**2,136**	**3,079**	**-30.6%**
	Value ($Cdn)	33,339	-	29,173	-	-	-	**62,512**	**108,181**	**-42.2%**
Other Countries	Kg	718	1,949	795	-	-	523	**3,985**	**10,816**	**-63.2%**
	Value ($Cdn)	31,143	67,716	28,705	-	-	13,864	**141,428**	**175,512**	**-19.4%**
Total	**Kg**	**49,744**	**40,407**	**30,330**	**1,098**	**1,480**	**20,940**	**143,999**	**608,153**	**-76.3%**
	Value ($Cdn)	**800,673**	**417,156**	**550,499**	**31,957**	**32,362**	**328,043**	**2,160,690**	**9,397,244**	**-77.0%**

Bone-in		Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	June 2020	January - June YTD 2020	2019	% Change
Total	**Kg**	**1,667**	**59,466**	**599**	**337**	**3,900**	**6,266**	**72,235**	**14,690**	**391.7%**
	Value ($Cdn)	**17,502**	**624,400**	**6,292**	**3,539**	**40,942**	**65,797**	**758,472**	**251,706**	**201.3%**

Total Exports, Boneless and Bone-in		Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	June 2020	January - June YTD 2020	2019	% Change
	Kg	**51,411**	**99,873**	**30,929**	**1,435**	**5,380**	**27,206**	**216,234**	**622,843**	**-65.3%**
	Value ($Cdn)	**818,175**	**1,041,556**	**556,791**	**35,496**	**73,304**	**393,840**	**2,919,162**	**9,648,950**	**-69.7%**

**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)
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
June 2020	397.89	395.50	339.29	335.70
July 2020	399.04	382.52	338.59	337.53

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
July 2020	350-400	350-375	250-325	250-325
Aug 2020	350-400	350-375	250-325	250-325

**source CBA survey of marketers*

For the U.S.Market

	Bulls	Heifers
June 2020	500	480
July 2020	500	480
Aug 2020	500	480

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

	May 2020		June 2020		July 2020		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,216-1,367	1,218.07	1,145-1,204	1,203.82	1,138-1,250	1,152.85	-5.4%	-4.2%
Chuckroll/Clod Fresh	638-650	638.58	637-650	637.08	640-660	642.25	0.6%	0.8%
Striploin Fresh	1,057-1,112	1,058.75	1,037-1,134	1,037.64	950-1,200	1,008.42	-4.8%	-2.8%
Tenderloin Fresh	N/A	N/A	1,572-1,812	1,612.31	N/A	N/A	N/A	N/A
Grnd 85% Bulk, Frozen	560-766	620.19	570-756	641.71	N/A	N/A	N/A	N/A
Grnd 85% Patties, Fresh	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grnd 85% Patties, Frozen	570-741	678.20	580-762	647.28	590-791	650.30	-4.1%	0.5%

**source USDA*

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

	Mid-May 2020 Pricing	Mid-June 2020 Pricing	Mid-July 2020 Pricing	Mid-August 2020 Pricing
Tenderloin - Fresh	$50.00 - $56.90	$50.00 - $56.90	$50.00 - $56.90	$45.00 - $54.00
Strip Loin Boneless - Fresh	$27.50 - $33.00	$27.50 - $33.00	$27.50 - $33.00	$24.00 - $28.00
Inside Round - Fresh	$19.00 - $20.00	$19.00 - $20.00	$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 - $14.50	$11.95 - $14.50	$11.95 - $14.50	$11.95 - $14.00

**source CBA survey of marketers*

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

Jack Auction Group (SK) (August 10, 2020)
Head Sold: 222

Class	# of head	Average/lb
2018 Bulls Cross (1,150 Base)	10	2.26
2018 Bulls Cross (1,050 Base)	14	2.26
2019 Hfrs Cross (675 Base)	50	2.16
2018/19 Mixed Cross (650 Base)	53	1.85
2018 Mixed Cross (500 Base)	37	1.71
2019 Mixed Cross (350 Base)	25	1.50
Mature Cows Cross (800 Base)	31	1.47
Mature Bulls Cross (1,750 Base)	2	1.00

Jack Auction Group (SK) (July 6, 2020)
Head Sold: 53

Class	# of head	Average/lb
2018 Bull Yrlg Cross (1,150 Base)	29	2.32
2018 Hfrs Yrlg Cross (875 Base)	18	1.91
Aged Cows Cull (1,000 Base)	6	1.00

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

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 in Canada to mid-August have remained stable over the past month. Prices continue to reflect the ongoing impact of COVID-19 on the food service marketplace in North America and Europe. Prices remained stronger in the U.S. as the industry continues to take advantage of the strong retail demand for red meats. In Canada, with weak food service demand, fewer animals were being slaughtered as marketers are not prepared to carry increased meat inventory. The build-up of market-ready bison on farms continues to be problematic. There should be no shortage of market-ready bison over the next six months.

From January 1 to August 15, 2020, 3,828 bison were slaughtered in federally-inspected plants in Canada; 1,494 or 28.1% below the 5,322 slaughtered during the same time period in 2019.

Impacted by COVID-19, Canadian bison slaughter from April 4, 2020 to August 15, 2020 totalled 1,354 head, which is down 54.0% compared to the 2,941 head slaughtered during the same time period in 2019. Continued soft food service demand for bison products in both the domestic and European markets, combined with limited available slaughter spaces for bison, will continue to keep Canadian bison slaughter at current levels.

Live bison exports at 15,351 head for the first seven months of 2020, are 6.6% ahead of the 14,401 live animals exported during January-July 2019. A major part of the increase has been in slaughter animals.

Prices offered by Canadian buyers for slaughter in Canada, range between CDN $3.50 - $4.00/lb HHW for Grade “A” bison bulls on light trading. Heifers are priced at similar levels, again on light trading. Canadian buyers purchasing bulls for slaughter in the U.S. market are paying CDN $5.00/lb HHW when slaughter dates are available. Heifers are priced at about 20 cents per pound 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 $4.00/lb HHW for prime bulls from Canada for slaughter in the U.S. They are offering US $3.80/lb HHW for heifers. Returns to the producers are dependent on exchange rates, quality, transportation, and export costs.

U.S. consumer demand for bison products continues to be stronger than that experienced in Canada. Demand for ground and fresh trim is steady with a build-up of tenderloin, middle cuts, and some trim.

In Canada, the demand for bison meat products is steady with some retailers offering fresh bison products and others offering frozen products. The surplus of frozen products was somewhat reduced through the government food rescue program as well as the purchase of bison products by Food Banks Canada. This has provided some liquidity for the industry. More such purchases would be beneficial.

Bison meat exports continue to Europe. As the European economy recovers, it is expected that demand for bison products will continue to increase.

Market uncertainty is expected to continue as the world and the marketplace adjust to the consequences of COVID-19.

Chart 1

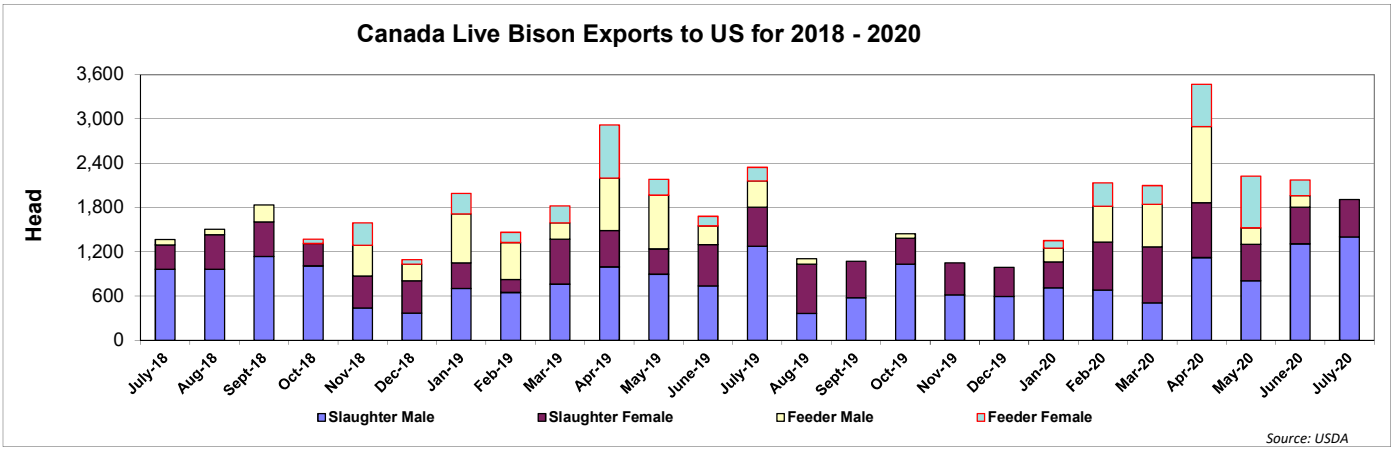
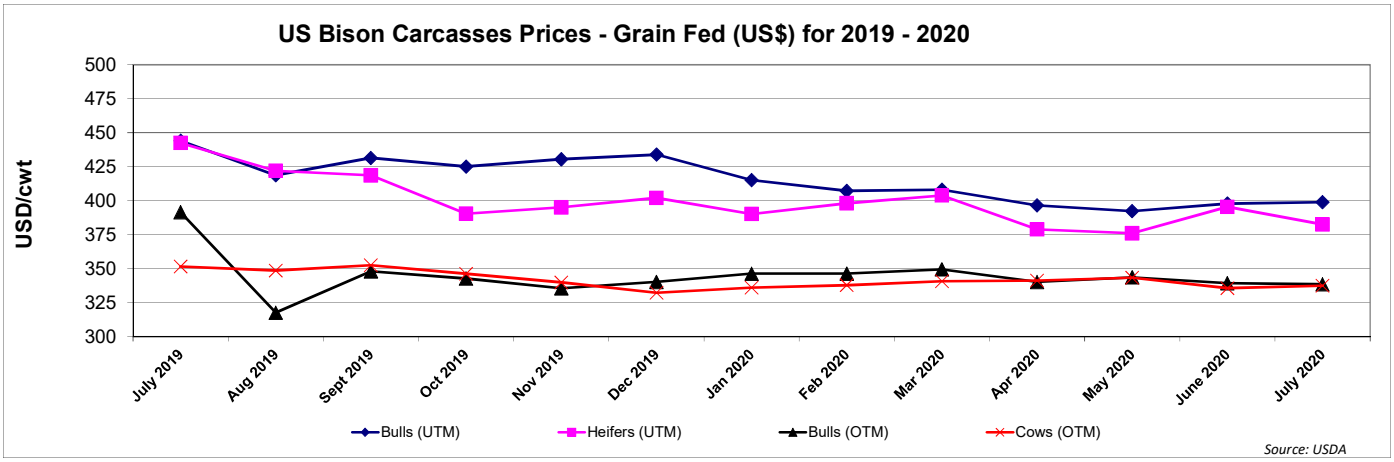


Chart 2



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