Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - November 23, 2020.

Weekly Federally Inspected Slaughter

	3-Oct	10-Oct	17-Oct	24-Oct	Oct Total	January - October YTD 2020	2019	% Change
Total Canada	*95*	*161*	*111*	*140*	**507**	**5,099**	**6,704**	**-23.9%**
previous year	*51*	*246*	*3*	*317*	***617***			

Provincially Inspected Slaughter

	May 2020	June 2020	July 2020	August 2020	Sept 2020	Sept 2019	January - September YTD 2020	2019	% Change
BC / Alberta	75	115	88	70	59	35	718	537	33.7%
Sask / Manitoba	34	67	55	48	40	16	371	240	54.6%
Ontario / Quebec	34	42	48	55	38	35	364	353	3.1%
Canada Total	**143**	**224**	**191**	**173**	**137**	**86**	**1,453**	**1,130**	**28.6%**

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 *	**6,552**	**7,834**	**-16.4%**

**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

	2014	2015	2016	2017	2018	2019	January - September YTD 2020	2019	% Change
Total Slaughter	14,371	14,186	11,568	10,886	10,041	9,585	6,045	7,217	**-16.2%**
Total Live Exports	19,033	26,162	18,364	17,600	17,342	20,060	19,318	16,576	**16.5%**
Total Production	**33,404**	**40,348**	**29,932**	**28,486**	**27,383**	**29,645**	**25,363**	**23,793**	**6.6%**

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

US Federal Slaughter*

for week ending:	3-Oct	10-Oct	17-Oct	24-Oct	Oct Total	January - October YTD 2020	2019	% Change
	1,198	**1,115**	**1,265**	**1,337**	**4,915**	**51,341**	**44,700**	**14.9%**
previous year	*1,040*	*1,067*	*1,048*	*1,018*	***4,173***			

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

Canada Live Bison Exports to US

	June - 20	July - 20	August - 20	September - 20	October - 20	January - October YTD 2020	2019	% Change
Slaughter Male	1,306	1,402	1,116	943	937	9,532	7,983	**19.4%**
Slaughter Female	495	506	713	1,030	721	6,458	4,566	**41.4%**
Feeder Male	161	0	80	0	80	2,834	3,572	**-20.7%**
Feeder Female	210	0	85	0	49	2,281	1,899	**20.1%**
Total	**2,172**	**1,908**	**1,994**	**1,973**	**1,787**	**21,105**	**18,020**	**17.1%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		Apr 2020	May 2020	June 2020	July 2020	August 2020	Sept 2020	January - September YTD 2020	2019	% Change
United States	Kg	293	790	19,038	9,230	8,395	7,943	**155,796**	**441,848**	**-64.7%**
	Value ($Cdn)	13,942	24,084	267,209	145,498	140,637	140,751	**2,115,424**	**7,335,799**	**-71.2%**
France	Kg	663	690	625	527	1,149	-	**5,915**	**32,120**	**-81.6%**
	Value ($Cdn)	15,912	8,278	12,024	17,995	27,581	-	**163,393**	**1,042,817**	**-84.3%**
Switzerland	Kg	-	-	754	-	405	247	**3,921**	**34,008**	**-88.5%**
	Value ($Cdn)	-	-	34,946	-	17,558	10,972	**176,822**	**871,259**	**-79.7%**
	Kg	-	-	-	-	-	-	**-**	**41,844**	**N/A**
Saint Pierre and Miquelon	Value ($Cdn)	-	-	-	-	-	-	**-**	**400,057**	**N/A**
Germany	Kg	-	-	-	-	-	-	**-**	**139,996**	**N/A**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**1,429,450**	**N/A**
Mexico	Kg	-	-	-	-	-	-	**-**	**61,685**	**N/A**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**509,498**	**N/A**
Netherlands	Kg	-	-	-	-	-	-	**2,136**	**4,789**	**-55.4%**
	Value ($Cdn)	-	-	-	-	-	-	**62,512**	**148,931**	**-58.0%**
Other Countries	Kg	-	-	523	626	405	373	**5,389**	**33,919**	**-84.1%**
	Value ($Cdn)	-	-	13,864	17,711	19,321	17,907	**196,367**	**509,527**	**-61.5%**
Total	**Kg**	**956**	**1,480**	**20,940**	**10,383**	**10,354**	**8,563**	**173,157**	**790,209**	**-78.1%**
	Value ($Cdn)	**29,854**	**32,362**	**328,043**	**181,204**	**205,097**	**169,630**	**2,714,518**	**12,247,338**	**-77.8%**

Bone-in		Apr 2020	May 2020	June 2020	July 2020	August 2020	Sept 2020	January - September YTD 2020	2019	% Change
Total	**Kg**	**337**	**3,900**	**6,266**	**3,625**	**14,617**	**5,696**	**96,173**	**15,001**	**541.1%**
	Value ($Cdn)	**3,539**	**40,942**	**65,797**	**38,063**	**152,607**	**59,795**	**1,008,937**	**263,127**	**283.4%**

Total Exports, Boneless and Bone-in		Apr 2020	May 2020	June 2020	July 2020	August 2020	Sept 2020	January - September YTD 2020	2019	% Change
	Kg	**1,293**	**5,380**	**27,206**	**14,008**	**24,971**	**14,259**	**269,330**	**805,210**	**-66.6%**
	Value ($Cdn)	**33,393**	**73,304**	**393,840**	**219,267**	**357,704**	**229,425**	**3,723,455**	**12,510,465**	**-70.2%**

**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)
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
Aug 2020	400.16	373.40	338.43	336.98
Sept 2020	396.19	386.83	336.00	328.26
Oct 2020	394.58	376.67	334.74	311.64

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Sept 2020	350-400	350-375	250-325	250-325
Oct 2020	350-400	350-375	250-325	250-325
Nov 2020	350-380	350-380	225-325	225-325

**source CBA survey of marketers*

For the U.S.Market

	Bulls	Heifers
June 2020	500	480
July 2020	500	480
Aug 2020	500	480
Sept 2020	500-525	480-500
Oct 2020	500-525	480-500
Nov 2020	500-525	480-500

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

	August 2020		September 2020		October 2020		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,010-1,400	1,023.70	1,098-1,400	1,166.34	1,067-1,152	1,121.92	9.6%	-3.8%
Chuckroll/Clod Fresh	595-665	599.25	630-675	634.03	636-650	636.09	6.1%	0.3%
Striploin Fresh	849-1,250	947.30	958-1,300	967.44	900-940	926.33	-2.2%	-4.2%
Tenderloin Fresh	1,183-1,806	1,233.55	1,390-1,711	1,424.22	1,490-1,694	1,578.49	28.0%	10.8%
Grnd 85% Bulk, Frozen	565-785	641.90	585-767	680.38	545-752	636.20	-0.9%	-6.5%
Grnd 85% Patties, Fresh	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grnd 85% Patties, Frozen	570-775	608.94	727-739	732.62	560-720	612.40	0.6%	-16.4%

**source USDA*

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

	Mid-August 2020 Pricing	Mid-September 2020 Pricing	Mid-October 2020 Pricing	Mid-November 2020 Pricing
Tenderloin - Fresh	$45.00 - $54.00	$45.00 - $54.00	$45.00 - $54.00	$45.00 - $56.00
Strip Loin Boneless - Fresh	$24.00 - $28.00	$24.00 - $32.00	$24.00 - $32.00	$24.00 - $32.00
Inside Round - Fresh	$19.00 - $20.00	$19.00 - $20.00	$19.00 - $20.00	$18.00 - $20.00
Ground 90% Bulk Fresh	$16.95 - $18.95	$16.95 - $18.95	$16.95 - $18.95	$16.25 - $16.25
Fresh Bison Trim	$11.95 - $14.00	$11.95 - $14.00	$11.95 - $14.75	$13.50 - $14.50

**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

As of mid-November, prices offered by Canadian buyers for slaughter in Canada ranged between $3.50 - $3.80/lb HHW for Grade "A" bison on very 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 up to CAD $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 up to USD $4.00/lb HHW for prime bulls from Canada for slaughter in the U.S. where slaughter times have been booked. They are offering USD $3.80/lb for heifers. Returns to the producers are dependent on exchange rates, quality, transportation, and export costs.

From January 1st to November 14th, 2020, 5,395 bison were slaughtered in federally-inspected plants in Canada – 1,674 or 23.7% below the 7,069 slaughtered during the same period in 2019.

Impacted by COVID-19, Canadian bison slaughter from April 4, 2020 to November 14, 2020 at 2,921 head is down 37.7% compared to the 4,688 head slaughtered during the same period in 2019. Continued weak food service demand for bison in the domestic and European markets will continue to keep Canadian bison slaughter at current levels.

Live bison exports at 21,105 head for the first ten months of 2020 are 17.1% ahead of the 18,020 live animals exported for the first ten months of 2019.

Canadian boneless bison exports to the U.S. (from January 1 to September 30, 2020) totalled 155,796 kg; 65% below the 441,848 kg exported during the same time period in 2019. Boneless bison exports from Canada to Europe to September 30, 2020 at 13,440 kg were 93% below the 180,309 kg exported during the same period in 2019. This data does not include Canadian bison that are processed in the U.S., and then exported to the European market.

Canadian marketers that process in Canada, for the Canadian and European markets, indicate that demand is very weak. With the winter months upon us and the increasing number of Coronavirus cases globally, some further softening of demand in the near term is expected. It is reported that most of the middle cuts are being sold, but there is a burdensome build-up of trim. As Canadian bison trim inventories grow, the appetite to slaughter more bison in Canada decreases - leaving a growing inventory of finished bison on farm, which is also expected to impact calf prices into the new year. More information on calf prices will be shared as it is made available.

In the Canadian marketplace, fresh bison is available through many of the major retail outlets in Canada. Also, many producers have either started or have expanded their farm-gate market activities at their local level. As some of the market uncertainty is removed from the marketplace, the local national and international markets will be important to support the growth of the industry.

Chart 1

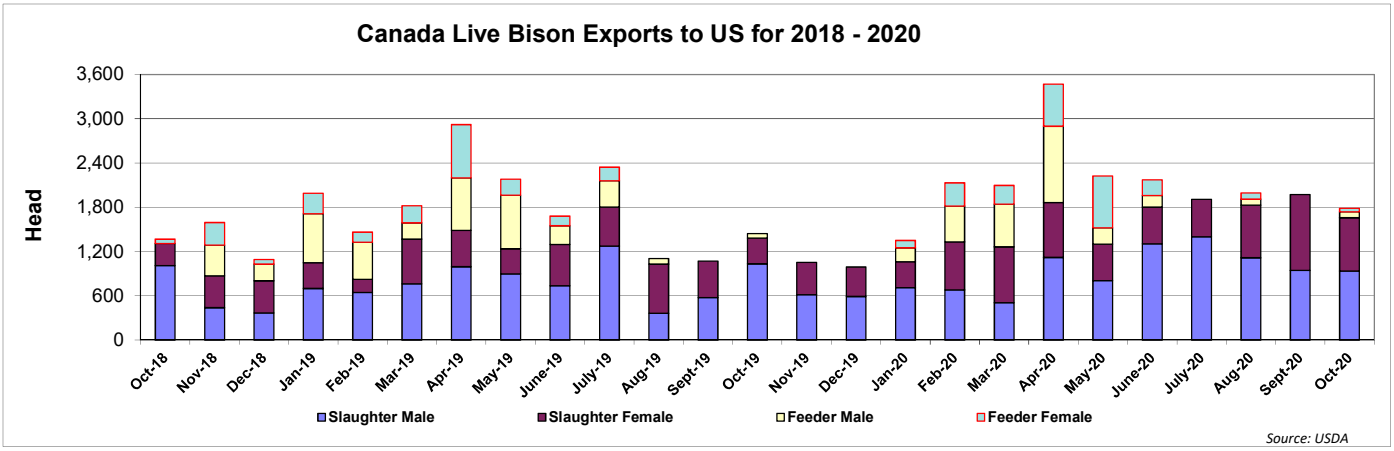
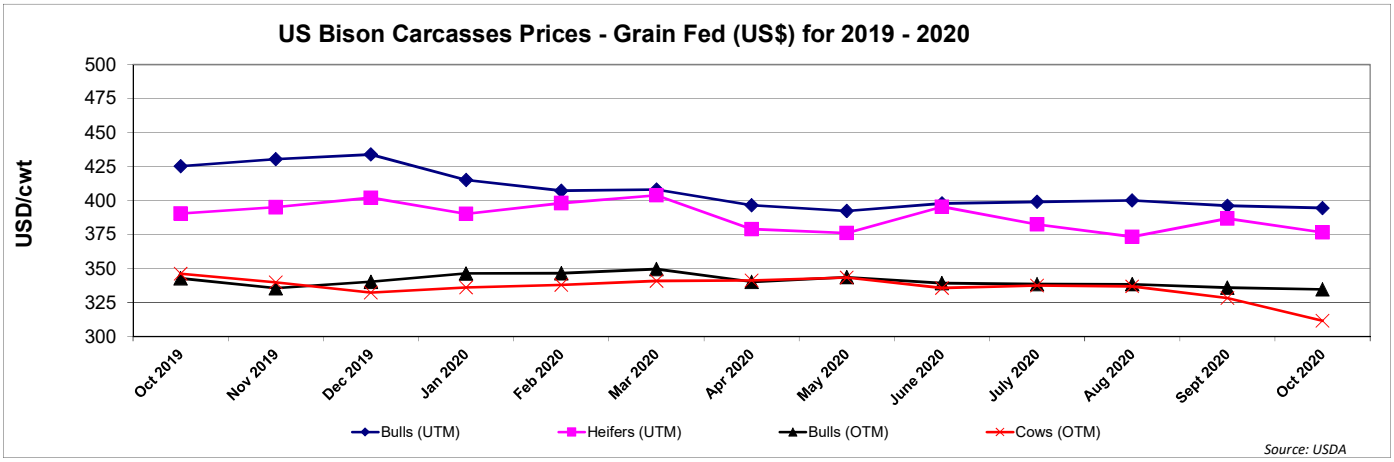


Chart 2



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