



BISON MARKET AND SUPPLY UPDATE

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

Weekly Federally Inspected Slaughter

	31-Oct	7-Nov	14-Nov	21-Nov	Nov Total	January - November YTD		
						2020	2019	% Change
Total Canada	103	83	110	99	395	5,494	7,279	-24.5%
previous year	53	184	128	210	575			

Provincially Inspected Slaughter

	June 2020	July 2020	August 2020	Sept 2020	October 2020	October 2019	January - October YTD		
							2020	2019	% Change
BC / Alberta	115	88	70	59	26	43	744	580	28.3%
Sask / Manitoba	67	55	48	42	40	20	413	260	58.8%
Ontario / Quebec	42	48	55	33	35	49	444	402	10.4%
Canada Total	224	191	173	134	101	112	1,601	1,242	28.9%

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 *	7,095	8,521	-16.7%

*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 - October YTD		
							2020	2019	% Change
Total Slaughter	14,371	14,186	11,568	10,886	10,041	9,585	6,700	7,946	-15.7%
Total Live Exports	19,033	26,162	18,364	17,600	17,342	20,060	21,105	18,020	17.1%
Total Production	33,404	40,348	29,932	28,486	27,383	29,645	27,805	25,966	7.1%

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

US Federal Slaughter*

	31-Oct	7-Nov	14-Nov	21-Nov	Nov Total	January - November YTD		
						2020	2019	% Change
for week ending:	1,232	1,279	1,224	1,452	5,187	56,528	49,029	15.3%
previous year	1,166	1,050	1,129	984	4,329			

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

Canada Live Bison Exports to US

	July - 20	August - 20	September - 20	October - 20	November - 20	January - November YTD		
						2020	2019	% Change
Slaughter Male	1,402	1,116	943	937	1,090	10,622	8,597	23.6%
Slaughter Female	506	713	1,030	721	560	7,018	5,003	40.3%
Feeder Male	0	80	0	80	0	2,834	3,572	-20.7%
Feeder Female	0	85	0	49	0	2,281	1,899	20.1%
Total	1,908	1,994	1,973	1,787	1,650	22,755	19,071	19.3%

*source : USDA, APHIS

Canadian Fresh or Chilled Bison Meat Exports

		May 2020	June 2020	July 2020	August 2020	Sept 2020	Oct 2020	January - October YTD		
								2020	2019	% Change
Boneless										
United States	Kg	790	19,038	9,230	8,395	7,943	7,552	163,348	470,943	-65.3%
	Value (\$Cdn)	24,084	267,209	145,498	140,637	140,751	118,861	2,234,285	7,815,270	-71.4%
France	Kg	690	625	527	1,149	-	850	6,765	32,120	-78.9%
	Value (\$Cdn)	8,278	12,024	17,995	27,581	-	20,400	183,793	1,042,817	-82.4%
Switzerland	Kg	-	754	-	405	247	411	4,332	35,509	-87.8%
	Value (\$Cdn)	-	34,946	-	17,558	10,972	20,910	197,732	927,291	-78.7%
Saint Pierre and Miquelon	Kg	-	-	-	-	-	-	-	41,844	N/A
	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	8,077	-73.6%
	Value (\$Cdn)	-	-	-	-	-	-	62,512	245,199	-74.5%
Other Countries	Kg	-	523	626	405	373	-	5,389	39,192	-86.2%
	Value (\$Cdn)	-	13,864	17,711	19,321	17,907	-	196,367	662,941	-70.4%
Total	Kg	1,480	20,940	10,383	10,354	8,563	8,813	181,970	829,366	-78.1%
	Value (\$Cdn)	32,362	328,043	181,204	205,097	169,630	160,171	2,874,689	13,032,523	-77.9%

Bone-in

	May 2020	June 2020	July 2020	August 2020	Sept 2020	Oct 2020	January - October YTD		
							2020	2019	% Change
Total	3,900	6,266	3,625	14,617	5,696	33,734	129,907	15,001	766.0%
	40,942	65,797	38,063	152,607	59,795	409,387	1,418,324	263,127	439.0%

Total Exports, Boneless and Bone-in

	May 2020	June 2020	July 2020	August 2020	Sept 2020	Oct 2020	January - October YTD		
							2020	2019	% Change
Kg	5,380	27,206	14,008	24,971	14,259	42,547	311,877	844,367	-63.1%
Value (\$Cdn)	73,304	393,840	219,267	357,704	229,425	569,558	4,293,013	13,295,650	-67.7%

*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)
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
Nov 2020	393.03	386.84	336.13	325.24

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows			
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			
Dec 2020	350-380	350-380	225-325	225-325			

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
Dec 2020	500-525	480-500

**source CBA survey of marketers*

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

	September 2020		October 2020		November 2020		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mths prior	1 month prior
Ribeye Lip-On Fresh	1,098-1,400	1,166.34	1,067-1,152	1,121.92	1,160-1,195	1,178.96	1.1%	5.1%
Chuckroll/Clod Fresh	630-675	634.03	636-650	636.09	N/A	N/A	N/A	N/A
Striploin Fresh	958-1,300	967.44	900-940	926.33	980-1,380	1,017.65	5.2%	9.9%
Tenderloin Fresh	1,390-1,711	1,424.22	1,490-1,694	1,578.49	1,610-1,738	1,654.75	16.2%	4.8%
Gmd 85% Bulk, Frozen	585-767	680.38	545-752	636.20	515 - 751	585.07	-14.0%	-8.0%
Gmd 85% Patties, Fresh	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Gmd 85% Patties, Frozen	727-739	732.62	560-720	612.40	520-707	623.18	-14.9%	1.8%

**source USDA*

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

	Mid-September 2020 Pricing	Mid-October 2020 Pricing	Mid-November 2020 Pricing	Mid-December 2020 Pricing
Tenderloin - Fresh	\$45.00 - \$54.00	\$45.00 - \$54.00	\$45.00 - \$56.00	\$45.00 - \$56.00
Strip Loin Boneless - Fresh	\$24.00 - \$32.00	\$24.00 - \$32.00	\$24.00 - \$32.00	\$26.00 - \$28.00
Inside Round - Fresh	\$19.00 - \$20.00	\$19.00 - \$20.00	\$18.00 - \$20.00	\$17.50 - \$20.00
Ground 90% Bulk Fresh	\$16.95 - \$18.95	\$16.95 - \$18.95	\$16.25 - \$16.25	\$16.25 - \$16.25
Fresh Bison Trim	\$11.95 - \$14.00	\$11.95 - \$14.75	\$13.50 - \$14.50	\$13.50 - \$14.50

**source CBA survey of marketers*

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

Jack Auction Group (SK) (December 7, 2020)			Jack Auction Group (SK) (Aug 10, 2020)			Jack Auction Group (SK) (July 6, 2020)		
Head Sold: 367			Head Sold: 222			Head Sold: 53		
Class	# of head	Average/lb	Class	# of head	Average/lb	Class	# of head	Average/lb
2019 Bulls Cross (925 Base)	19	2.18	2018 Bulls Cross (1,150 Base)	10	2.26	2018 Bull Yrlg Cross (1,150 Base)	29	2.32
2019 Heifers Cross (825 Base)	30	1.92						
2018 Bulls Cross (1,050 Base)	35	1.88						
2018 Bulls Cross (900 Base)	35	1.66	2018 Bulls Cross (1,050 Base)	14	2.26	2018 Hfrs Yrlg Cross (875 Base)	18	1.91
2018 Bulls Cross (870 Base)	24	1.77						
2019 Bull Plains (760 Base)	13	1.77						
2019 Heifers Plains (690 Base)	15	1.57	2019 Hfrs Cross (675 Base)	50	2.16	Aged Cows Cull (1,000 Base)	6	1.00
2019 Heifers Cross (625 Base)	8	1.80						
2019 Mixed Plains (600 Base)	18	1.36	2018/19 Mixed Cross (650 Base)	53	1.85			
2019 Bulls Cross (745 Base)	14	1.66						
2018 Irish Creek Premium Bred Heifers	5	4300.00	2018 Mixed Cross (500 Base)	37	1.71			
2018 Irish Creek Premium Bred Heifers	10	4150.00						
2018 Irish Creek Premium Bred Heifers	30	4150.00	2019 Mixed Cross (350 Base)	25	1.50			
2014 J&B Taylor Herd Dispersal Cows	9	2525.00						
2014 J&B Taylor Herd Dispersal Cows	9	2350.00	Mature Cows Cross (350 Base)	31	1.47			
2020 Bulls Plains (485 Base)	22	2.12						
2020 Heifers Plains (435 Base)	11	1.91	Mature Bulls Cross (1,750 Base)	2	1.00			
2020 Mixed Cross (400 Base)	10	2.06						
2020 Mixed Plains (400 Base)	25	1.75						
2020 Mixed Plains (400 Base)	25	1.75						

Commentary

By Terry Kremenik, 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 carmine.bianco@canada.ca

As of mid-December, 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 were priced at similar levels, again on light trading. It is unlikely that any bison will be slaughtered in Canada during the last three weeks of 2020 because of the impact of COVID-19 on plant workers at the primary bison slaughter facility.

Canadian buyers purchasing bulls for slaughter in the U.S. market are paying up to \$5.00/lb. HHW Canadian 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 \$4.00 /lb. US HHW for prime bulls from Canada for slaughter in the U.S. where slaughter times have been booked. They are offering up to \$3.80 /lb. U.S. for heifers. Returns to From January 1st to December 12, 2020, 5,741 bison were slaughtered in federally inspected plants in Canada – 2,263 or 28.0% below the 8004 slaughtered for the same period in 2019.

Impacted by COVID-19, Canadian bison slaughter from April 4, 2020 to December 12, 2020 at 3,267 head is down 44.0% compared to the 5,883 head slaughtered during the same period in 2019. Continued Total 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. Of these exports, 15,990 head were slaughter ready – 3,421 head or 27% more than the 12,569 slaughter ready bison exported in 2019.

Canadian boneless bison exports to the U.S. to September 30, 2020 at 155,796 Kg. were 65% below the 441,847 Kg. exported in 2019. Boneless bison exports from Canada to Europe to September 30, 2020 at 17,361 Kg. were 44% below the 30,926 Kg. exported during the same period in 2019. This data does not include Canadian bison that are processed in the US that finds its way to the European market.

Canadian marketers that process in Canada for the Canadian and European markets indicate that the demand is weak. With the winter months upon us and the increasing cases of the Corona virus 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 the Canadian bison trim inventories grow, the appetite to slaughter more bison in Canada decreases - leaving a growing inventory of finished bison on the farms. The increased inventory has been further impacted by the closure of a bison processing plant to deal with the consequences of COVID-19.

Despite the softness in the marketplace for, and the backlog of finished bison, fall run bison calf prices are stronger than expected. Some of this strength can be attributed to the marketplace optimism because of the COVID -19 vaccine as well as the U.S. Department of Agriculture's Agricultural Marketing Service (AMS) approval of the National Bison Association's request for a \$17 million purchase of ground bison under the Section 32 Surplus Removal program. In addition, more producers are likely going to hold calves longer than they normally would, expecting some price improvement. At a Ritchie Bros. December 5th North Battleford sale, a pen of quality bull calves reached in excess of \$2.40/lb. live weight. Several lots sold closer to \$2.25/lb. A pen of seven 2019 bulls weighing an average of 754 lbs sold for \$2.06 per pound. A pen of eight 2019 bulls averaging 1058 lbs. sold for \$1.96 per pound. The detail sale results when available will be posted on the Canadian bison association website at

: <https://www.canadianbison.ca/resources/resources/marketing/auction-markets>

In the Canadian marketplace fresh bison continues to be available through many of the major retail outlets in Canada, from local outlets as well as from farm gate market sale activities.

Chart 1

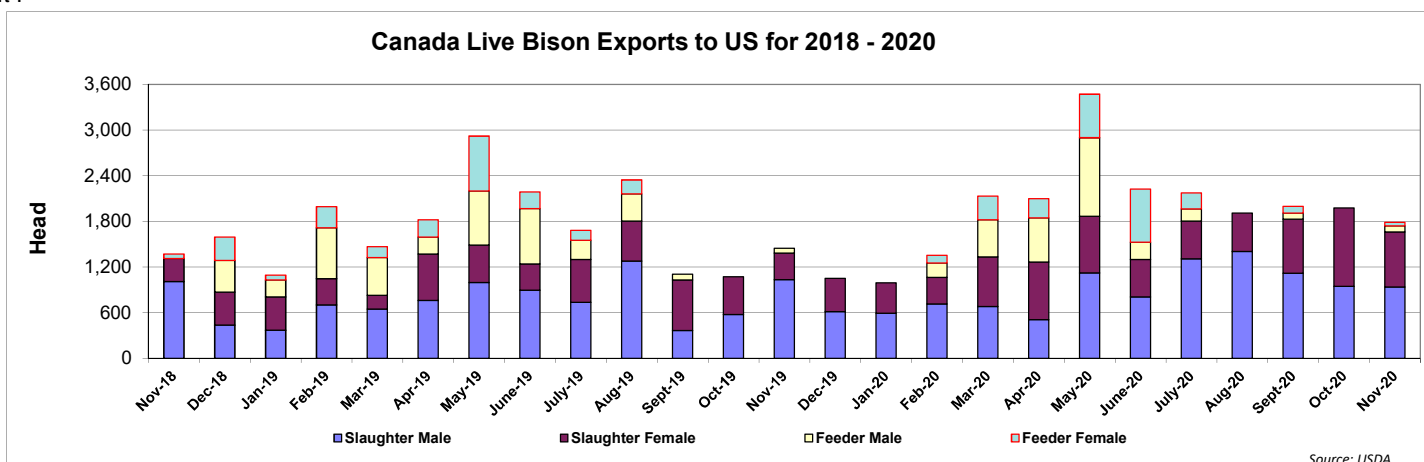
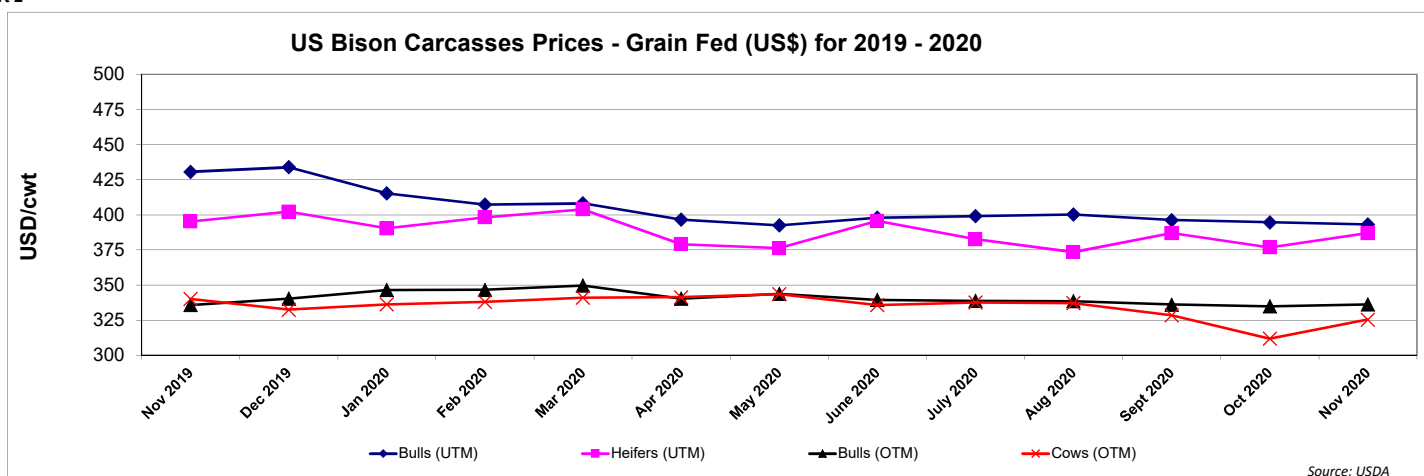


Chart 2



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	12,856	-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 publicly disclosure the number of bison

