Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - January 25, 2021.

Weekly Federally Inspected Slaughter

	28-Nov	5-Dec	12-Dec	19-Dec	26-Dec	2-Jan	Dec Total	January - December YTD 2020	2019	% Change
Total Canada	*101*	*189*	*3*	*64*	*2*	*0*	**359**	**5,853**	**8,088**	**-27.6%**
previous year	*250*	*271*	*78*	*169*	*41*		***809***			

Provincially Inspected Slaughter

	July 2020	August 2020	Sept 2020	October 2020	November 2020	November 2019	January - November YTD 2020	2019	% Change
BC / Alberta	88	70	59	26	72	63	887	643	37.9%
Sask / Manitoba	55	48	42	40	33	29	446	289	54.3%
Ontario / Quebec	48	55	33	35	31	49	475	451	5.3%
Canada Total	**191**	**173**	**134**	**101**	**136**	**141**	**1,808**	**1,383**	**30.7%**

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 *	**7,661**	**9,471**	**-19.1%**

**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 - November YTD 2020	2019	% Change
Total Slaughter	14,371	14,186	11,568	10,886	10,041	9,585	7,302	8,662	**-15.7%**
Total Live Exports	19,033	26,162	18,364	17,600	17,342	20,060	22,755	19,071	**19.3%**
Total Production	**33,404**	**40,348**	**29,932**	**28,486**	**27,383**	**29,645**	**30,057**	**27,733**	**8.4%**

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

US Federal Slaughter*

for week ending:	28-Nov	5-Dec	12-Dec	19-Dec	26-Dec	2-Jan	Dec Total	January - December YTD 2020	2019	% Change
	923	**1,141**	**1,214**	**1,217**	**967**	**1,066**	**6,528**	**63,056**	**54,051**	**16.7%**
previous year	855	1,242	1,079	1,086	760		***5,022***			

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

Canada Live Bison Exports to US

	August - 20	September - 20	October - 20	November - 20	December -20	January - December YTD 2020	2019	% Change
Slaughter Male	1,116	943	937	1,090	1,021	11,643	9,188	**26.7%**
Slaughter Female	713	1,030	721	560	786	7,804	5,401	**44.5%**
Feeder Male	80	0	80	0	3	2,837	3,572	**-20.6%**
Feeder Female	85	0	49	0	9	2,290	1,899	**20.6%**
Total	**1,994**	**1,973**	**1,787**	**1,650**	**1,819**	**24,574**	**20,060**	**22.5%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		June 2020	July 2020	August 2020	Sept 2020	Oct 2020	Nov 2020	January - November YTD 2020	2019	% Change
United States	Kg	19,038	9,230	8,395	7,943	7,552	23,035	**186,383**	**517,662**	**-64.0%**
	Value ($Cdn)	267,209	145,498	140,637	140,751	118,861	279,747	**2,514,032**	**8,464,541**	**-70.3%**
France	Kg	625	527	1,149	-	850	469	**7,234**	**34,752**	**-79.2%**
	Value ($Cdn)	12,024	17,995	27,581	-	20,400	10,429	**194,222**	**1,122,429**	**-82.7%**
Switzerland	Kg	754	-	405	247	411	-	**4,332**	**36,838**	**-88.2%**
	Value ($Cdn)	34,946	-	17,558	10,972	20,910	-	**197,732**	**979,621**	**-79.8%**
Saudi Arabia	Kg	-	-	-	-	-	29,178	**29,178**	**-**	**N/A**
	Value ($Cdn)	-	-	-	-	-	301,871	**301,871**	**-**	**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**	**11,708**	**-81.8%**
	Value ($Cdn)	-	-	-	-	-	-	**62,512**	**357,239**	**-82.5%**
Other Countries	Kg	-	523	626	405	373	-	**5,389**	**86,177**	**-93.7%**
	Value ($Cdn)	-	13,864	17,711	19,321	17,907	-	**196,367**	**1,214,837**	**-83.8%**
Total	**Kg**	**20,417**	**10,280**	**10,575**	**8,595**	**9,186**	**52,682**	**234,652**	**888,818**	**-73.6%**
	Value ($Cdn)	**314,179**	**177,357**	**203,487**	**171,044**	**178,078**	**592,047**	**3,466,736**	**14,077,615**	**-75.4%**

Bone-in		June 2020	July 2020	August 2020	Sept 2020	Oct 2020	Nov 2020	January - November YTD 2020	2019	% Change
Total	**Kg**	**6,266**	**3,625**	**14,617**	**5,696**	**33,734**	**23,195**	**153,102**	**15,001**	**920.6%**
	Value ($Cdn)	**65,797**	**38,063**	**152,607**	**59,795**	**409,387**	**243,548**	**1,661,872**	**263,127**	**531.6%**

Total Exports, Boneless and Bone-in		June 2020	July 2020	August 2020	Sept 2020	Oct 2020	Nov 2020	January - November YTD 2020	2019	% Change
	Kg	**26,683**	**13,905**	**25,192**	**14,291**	**42,920**	**75,877**	**387,754**	**903,819**	**-57.1%**
	Value ($Cdn)	**379,976**	**215,420**	**356,094**	**230,839**	**587,465**	**835,595**	**5,128,608**	**14,340,742**	**-64.2%**

**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)
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
Dec 2020	388.99	369.16	325.83	329.09

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Jan 2021	350-380	350-380	180-195	180-195

**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
Dec 2020	500-525	480-500
Jan 2021	500-525	480-500

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

	October 2020		November 2020		December 2020		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,067-1,152	1,121.92	1,160-1,195	1,178.96	1,148 -1,190	1,171.63	4.4%	-0.6%
Chuckroll/Clod Fresh	636-650	636.09	N/A	N/A	615 - 665	615.67	N/A	N/A
Striploin Fresh	900-940	926.33	980-1,380	1,017.65	996 - 1,004	999.00	7.8%	-1.8%
Tenderloin Fresh	1,490-1,694	1,578.49	1,610-1,738	1,654.75	1,454 - 1,776	1,537.89	-2.6%	-7.1%
Grnd 85% Bulk, Frozen	545-752	636.20	515 - 751	585.07	505 - 752	586.22	-7.9%	0.2%
Grnd 85% Patties, Fresh	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grnd 85% Patties, Frozen	560-720	612.40	520-707	623.18	510 - 743	645.74	5.4%	3.6%

**source USDA*

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

	Mid-October 2020 Pricing	Mid-November 2020 Pricing	Mid-December 2020 Pricing	Mid-January 2021 Pricing
Tenderloin - Fresh	$45.00 - $54.00	$45.00 - $56.00	$45.00 - $56.00	$45.00 - $56.00
Strip Loin Boneless - Fresh	$24.00 - $32.00	$24.00 - $32.00	$26.00 - $28.00	$26.00 - $28.00
Inside Round - Fresh	$19.00 - $20.00	$18.00 - $20.00	$17.50 - $20.00	$17.50 - $20.00
Ground 90% Bulk Fresh	$16.95 - $18.95	$16.25 - $16.25	$16.25 - $16.25	$16.25 - $16.25
Fresh Bison Trim	$11.95 - $14.75	$13.50 - $14.50	$13.50 - $14.50	$12.60 - $14.00

**source CBA survey of marketers*

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

Jack Auction Group (SK) (Jan 11, 202)
Head Sold: 481

Class	# of head	Average/lb
2020 Bulls Cross (500 Base)	212	2.87
2020 Heifers Cross (470 Base)	212	2.04
2020 Bulls Plains (440 Base)	10	1.87
2020 Heifers Plains (390 Base)	10	1.50
2019 Bulls Plains (785 Base)	12	2.27
2019 Heifers Plains (700 Base)	23	1.76
2010 Bulls Plains (1900 Base)	2	1.00

Jack Auction Group (SK) (December 7, 2020)
Head Sold: 367

Class	# of head	Average/lb
2019 Bulls Cross (925 Base)	19	2.18
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 (870 Base)	24	1.77
2019 Bull Plains (760 Base)	13	1.77
2019 Heifers Plains (690 Base)	15	1.57
2019 Heifers Cross (625 Base)	8	1.80
2019 Mixed Plains (600 Base)	18	1.36
2019 Bulls Cross (745 Base)	14	1.66
2018 Irish Creek Premium Bred Heifers	5	4300.00
2018 Irish Creek Premium Bred Heifers	10	4150.00
2018 Irish Creek Premium Bred Heifers	30	4150.00
2014 J&B Taylor Herd Dispersal Cows	9	2525.00
2014 J&B Taylor Herd Dispersal Cows	9	2350.00
2020 Bulls Plains (485 Base)	22	2.12
2020 Heifers Plains (435 Base)	11	1.91
2020 Mixed Cross (400 Base)	10	2.06
2020 Mixed Plains (400 Base)	25	1.75
2020 Mixed Plains (400 Base)	25	1.75

Jack Auction Group (SK) (Aug 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 (350 Base)	31	1.47
Mature Bulls Cross (1,750 Base)	2	1.00

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 carmine.bianco@canada.ca

With the beginning of a new year, there is a degree of optimism in the demand with the vaccine rollout.

2020 ended with Canadian buyers paying $3.50 - $3.80/lb. HHW on very light trading. A total of 5,853 animals were slaughtered in 2020 compared to 8,088 in 2019 – a decline of 28% and the lowest Canadian slaughter numbers in 20 years.

The first two weeks of 2021 saw 218 animals slaughtered in federal plants compared to 270 last year – too early to indicate a trend. As of mid-January, 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. Mature bulls and cows were selling at $1.80 – $1.95/lb. HHW.

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 the

Total live bison exports to the US in 2020 at 23,703 head are 16.7 % above the 20,307 exported in 2019.

Canadian boneless bison exports to the U.S. to November 30, 2020 at 186,383 Kg. were 64% below the 517,662 Kg. exported in 2019. Total bison exports from Canada to Europe to November 30, 2020 at 65,218 Kg. were 54% below the 142,231 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 continues to be very 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.

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 activities.

Chart 1

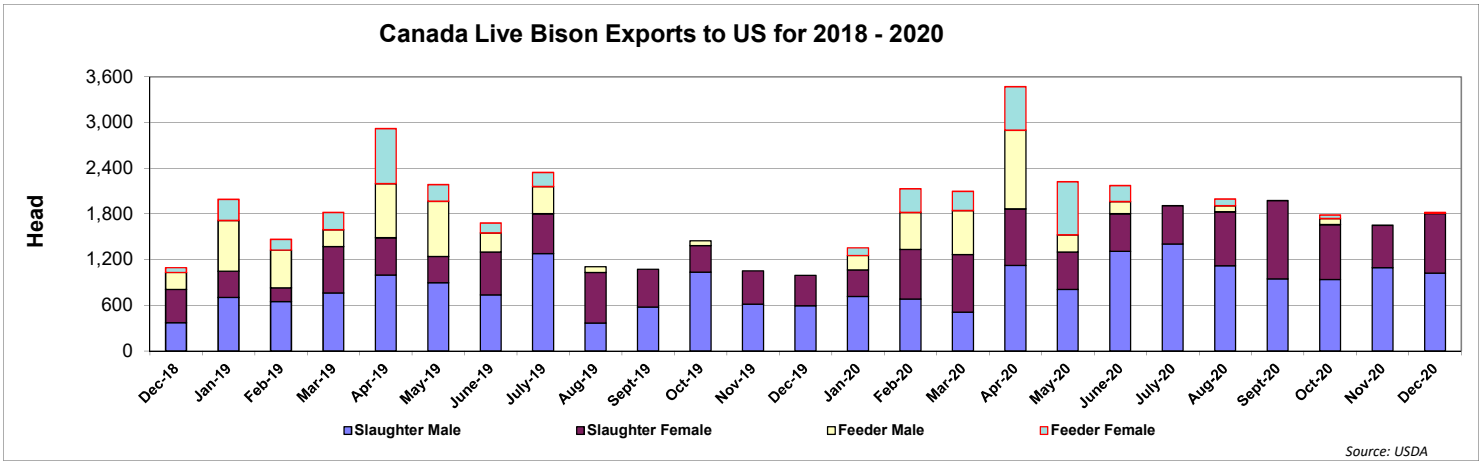
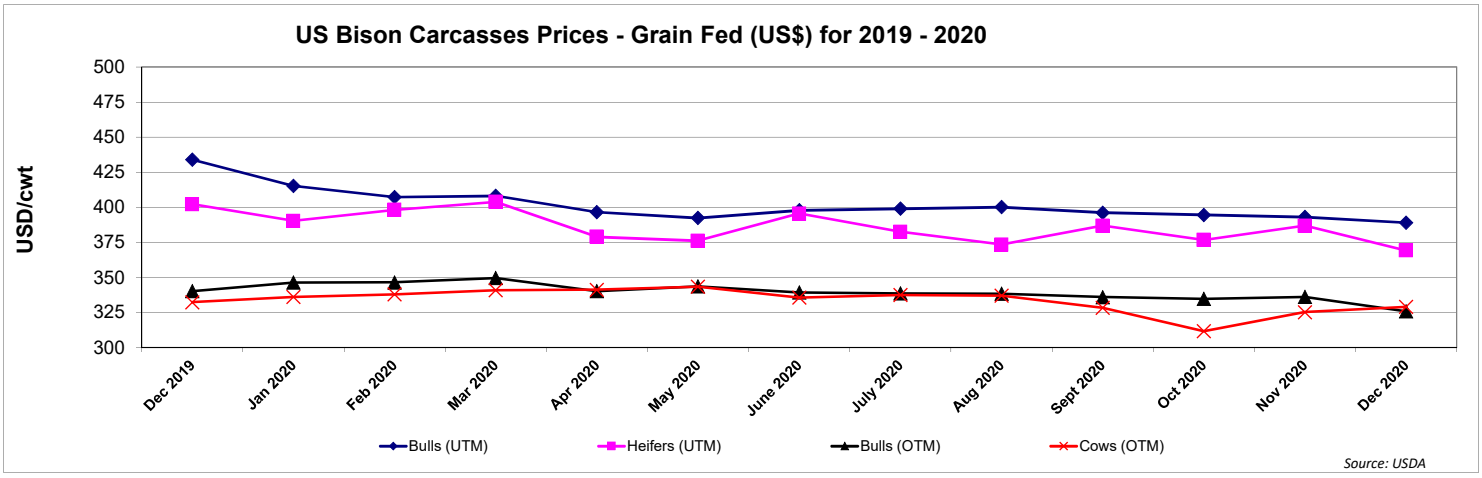


Chart 2



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	12,656	-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