Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - March 30, 2021.

Weekly Federally Inspected Slaughter

	6-Feb	13-Feb	20-Feb	27-Feb	Feb Total	January - February YTD 2021	2020	% Change
Total Canada	*230*	*57*	*137*	*146*	**570**	**1,022**	**1,432**	**-28.6%**
previous year	*107*	*230*	*215*	*204*	***756***			

Provincially Inspected Slaughter

	September 2020	October 2020	November 2020	December 2020	January 2021	January 2020	January - January YTD 2021	2020	% Change
BC / Alberta	59	97	72	80	54	98	54	98	-44.9%
Sask / Manitoba	42	40	33	28	32	28	32	28	14.3%
Ontario / Quebec	33	47	81	28	28	37	28	37	-24.3%
Canada Total	**134**	**184**	**186**	**186**	**136**	**163**	**136**	**163**	**-16.6%**

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 *	**7,859**	**9,585**	**-18.0%**

**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

	2015	2016	2017	2018	2019	2020	January - January YTD 2021	2020	% Change
Total Slaughter	14,186	11,568	10,886	10,041	9,585	7,859	566	839	**-32.5%**
Total Live Exports	26,162	18,364	17,600	17,342	20,060	24,574	2,011	1,462	**37.6%**
Total Production	**40,348**	**29,932**	**28,486**	**27,383**	**29,645**	**32,433**	**2,577**	**2,301**	**12.0%**

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

US Federal Slaughter*

for week ending:	6-Feb	13-Feb	20-Feb	27-Feb	Feb Total	January - February YTD 2021	2020	% Change
	1,140	**1,249**	**1,130**	**1,285**	**4,804**	**9,854**	**8,763**	**12.5%**
previous year	1,086	1,104	1,170	1,131	***4,491***			

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

Canada Live Bison Exports to US

	September - 20	October - 20	November - 20	December -20	January -21	February -21	January - February YTD 2021	2020	% Change
Slaughter Male	943	937	1,090	1,021	1,076	890	1,966	1,393	**41.1%**
Slaughter Female	1,030	721	560	786	588	515	1,103	1,000	**10.3%**
Feeder Male	0	80	0	3	124	324	448	675	**-33.6%**
Feeder Female	0	49	0	9	159	427	586	414	**41.5%**
Total	**1,973**	**1,787**	**1,650**	**1,819**	**1,947**	**2,156**	**4,103**	**3,482**	**17.8%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		August 2020	Sept 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	January - January YTD 2021	2020	% Change
United States	Kg	8,395	7,943	7,552	23,035	4,404	43,256	**43,256**	**46,884**	**-7.7%**
	Value ($Cdn)	140,637	140,751	118,861	279,747	71,489	485,043	**485,043**	**680,628**	**-28.7%**
Switzerland	Kg	405	247	411	-	245	163	**163**	**574**	**-71.6%**
	Value ($Cdn)	17,558	10,972	20,910	-	10,652	7,558	**7,558**	**25,236**	**-70.1%**
Belgium	Kg	-	-	-	-	-	-	-	-	-
	Value ($Cdn)	-	-	-	-	-	-	-	-	-
France	Kg	1,149	-	850	469	1,323	-	-	**692**	**-100.0%**
	Value ($Cdn)	27,581	-	20,400	10,429	48,203	-	-	**30,327**	**-100.0%**
Germany	Kg	-	-	-	-	71	-	-	-	-
	Value ($Cdn)	-	-	-	-	3,484	-	-	-	-
Italy	Kg	405	373	-	-	-	-	-	**718**	**-100.0%**
	Value ($Cdn)	19,321	17,907	-	-	-	-	-	**31,143**	**-100.0%**
Netherlands	Kg	-	-	-	-	-	-	-	**876**	**-100.0%**
	Value ($Cdn)	-	-	-	-	-	-	-	**33,339**	**-100.0%**
Other Countries	Kg	29	1,791	(250)	(14,691)	17,461	(37,376)	-	-	-
	Value ($Cdn)	(23,893)	35,467	9,459	(130,005)	156,348	(358,773)	-	-	-
Total	**Kg**	**10,383**	**10,354**	**8,563**	**8,813**	**23,504**	**6,043**	**43,419**	**49,744**	**-12.7%**
	Value ($Cdn)	**181,204**	**205,097**	**169,630**	**160,171**	**290,176**	**133,828**	**492,601**	**800,673**	**-38.5%**

Bone-in		August 2020	Sept 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	January - January YTD 2021	2020	% Change
Total	**Kg**	**14,617**	**5,696**	**33,734**	**23,195**	**5,733**	**10,540**	**10,540**	**1,667**	**532.3%**
	Value ($Cdn)	**152,607**	**59,795**	**409,387**	**243,548**	**74,480**	**109,096**	**109,096**	**17,502**	**523.3%**

Total Exports, Boneless and Bone-in		August 2020	Sept 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	January - January YTD 2021	2020	% Change
	Kg	**25,000**	**16,050**	**42,297**	**32,008**	**29,237**	**16,583**	**53,959**	**51,411**	**5.0%**
	Value ($Cdn)	**333,811**	**264,892**	**579,017**	**403,719**	**364,656**	**242,924**	**601,697**	**818,175**	**-26.5%**

**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)
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
Jan 2021	393.52	369.16	325.47	329.09
Feb 2021	391.13	359.39	326.47	320.19

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Feb 2021	350-380	350-380	180-195	180-195
Mar 2021	370-410	350-380	190-220	190-220

**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
Feb 2021	480-500	460-480
Mar 2021	470-500	440-470

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

	December 2020		January 2021		February 2021		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,148 -1,190	1,171.63	1,143 -1,195	1,154.10	1,135 - 1,182	1,154.44	-1.5%	0.0%
Chuckroll/Clod Fresh	615 - 665	615.67	630 - 660	630.44	639 - 681	659.06	7.0%	4.5%
Striploin Fresh	996 - 1,004	999.00	947 - 1,300	964.65	967 - 1,010	985.96	-1.3%	2.2%
Tenderloin Fresh	1,454 - 1,776	1,537.89	1,182 - 1,667	1,403.63	1,240 - 1,662	1,439.15	-6.4%	2.5%
Grnd 85% Bulk, Frozen	505 - 752	586.22	520 - 733	615.26	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	510 - 743	645.74	540 - 733	646.92	520 - 706	591.40	-8.4%	-8.6%

**source USDA*

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

	Mid-December 2020 Pricing	Mid-January 2021 Pricing	Mid-February 2021 Pricing	Mid-March 2021 Pricing
Tenderloin - Fresh	$45.00 - $56.00	$45.00 - $56.00	$45.00 - $56.00	$45.00 - $56.00
Strip Loin Boneless - Fresh	$26.00 - $28.00	$26.00 - $28.00	$26.00 - $28.00	$26.00 - $28.00
Inside Round - Fresh	$17.50 - $20.00	$17.50 - $20.00	$17.50 - $19.00	$17.50 - $19.00
Ground 90% Bulk Fresh	$16.25 - $16.25	$16.25 - $16.25	$16.25 - $16.25	$16.25 - $16.25
Fresh Bison Trim	$13.50 - $14.50	$12.60 - $14.00	$12.60 - $14.00	$12.60 - $14.00

**source CBA survey of marketers*

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

Jack Auction Group (SK) (Feb 8, 2021)
Head Sold: 1068

Class	# of head	Average/lb
2019 Bulls Cross (975 Base)	37	2.43
2019 Bulls Plains (885 Base)	21	2.21
2019 Bulls Cross (875Base)	54	2.20
2019 Bulls Cross (800 Base)	50	2.25
2019 Bulls Plains (800 Base)	21	1.98
2019 Bulls + Heifers Cross (700 Base)	70	1.79
2019 Heifers Plains (815 Base)	27	1.91
2019 Heifers Cross (725 Base)	34	1.81
2019 Heifers Plains (675 Base)	9	1.45
2019 Bulls + Heifers Plains (600 Base)	20	1.51
2019 Bulls Plains (600 Base)	8	1.61
2018 Bulls Cross (1050 Base)	20	1.92
2020 Bulls Cross (500 Base)	52	2.72
2020 Bulls Cross (480 Base)	43	2.30
2020 Bulls Cross (550 Base)	39	2.50
2020 Bulls Cross (400 Base)	25	2.12
2020 Bulls Plains (460 Base)	70	2.00
2020 Heifers Cross (460 Base)	45	1.90
2020 Hefiers Plains (415 Base)	70	2.00
2020 Bulls + Heifers Plains (400 Base)	48	1.88
2020 Bulls + Heifers Plains (375 Base)	25	1.58
2020 Heifers Plains (380 Base)	8	2.11
2020 Bulls Plains (375 Base)	17	2.07
2020 Heifers Plains (350 Base)	17	1.53

Ritchie Bros. Acutioneers (SK) (January 27, 2021)
Head Sold: 171

Class	# of head	Average/lb
2020 Bulls 500lbs+	5	2.29
2020 Bulls 400-499lbs	35	2.31
2020 Bulls 300-399lbs	10	1.90
2019 Bulls 1000+lbs	8	2.00
2019 Bulls 900-999lbs	13	2.08
2019 Bulls 800-900lbs	2	1.80
2019 Bulls 700-799lbs	2	1.67
2019 Bulls 600-699lbs	3	1.55
2020 Heifers 500+lbs	3	2.20
2020 Heifers 400-499lbs	29	2.22
2020 Heifers 300-399lbs	11	1.93
2019 Hefiers 900+lbs	3	1.77
2019 Hefiers 800-899lbs	6	1.58
2019 Heifers 700-799lbs	5	1.50
2019 Heifers 600-699lbs	5	1.48
2019 Heifers 500-599lbs	4	1.40
2019 Heifers 400-499lbs	6	1.49
2018 Heifers 1100+lbs	3	1.54
2018 Heifers 1000-1099lbs	5	1.62
2018 Heifers 900-999lbs	3	1.43
2018 Heifers 800-899lbs	3	1.35
Mature Cows 1200+lbs	3	0.85
Mature Cows 950-1099lbs	4	0.88

Jack Auction Group (SK) (Jan 11, 2021)
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

2018 Bred Heifers Fancy (1150 Base)	24	$3050-3400		
2013/14 Exposed Cows (1100 Base)	45	$2475-2700		
2006-2015 Bred Cows (1100 Base)	98	2025.00		
2001-2016 Exposed Cows (1100 Base)	30	$1300-1450		
Aged Bred Cows (1050 Base)	10	1225.00		
Aged Cull Cows (1100 Base)	16	1.03		
Aged Cull Bulls (1700 Base)	15	1.19		

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

The Canadian market is beginning to show some upward movement. Canadian buyers are paying up to $4.10/lb HHW for grade A bulls on light trading. Producers were receiving up to $2.20/lb HHW for mature cows with unconfirmed reports of higher prices.

To March 13th, 2021 animals slaughtered at federally inspected plants in Canada at 1,197 head is down 40.2% from the 2,003 animals slaughtered for the same period in 2020.

Canadian buyers purchasing prime 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 20 cents 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 and up to $3.80 /lb. U.S. for heifers from Canada for slaughter in the U.S. where slaughter times have been booked. Returns to the producers are dependent on exchange rates, quality, transportation and export costs.

In the U.S. for the month of January, 2021, 5,050 animals were slaughtered at federally inspected plants compared to the 4,472 head slaughtered in 2020 – an increase of 18.2%.

For the month of January 2021, finished live Canadian bison exports to the U.S. at 1,664 are up 57% compared to the 1,062 slaughtered in 2020. Feeder animal exports to the U.S. at about 285 head is comparable to last year.

It is reported that most of the middle cuts are being sold but there is some build-up of trim and prime cuts. As the Canadian bison trim inventories grow, the appetite to slaughter more bison in Canada

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

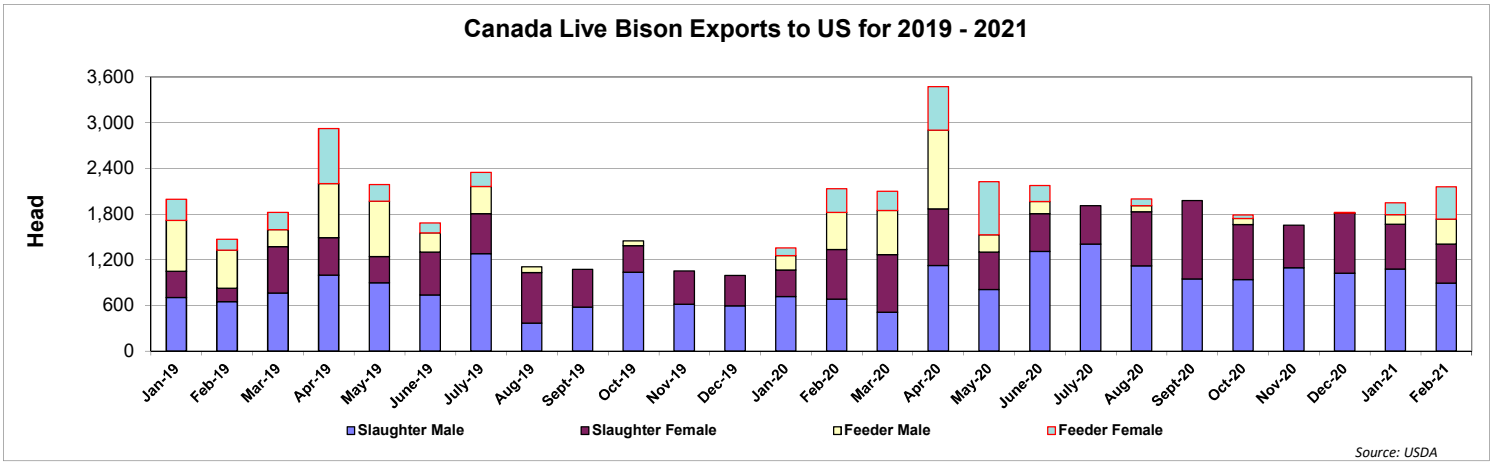
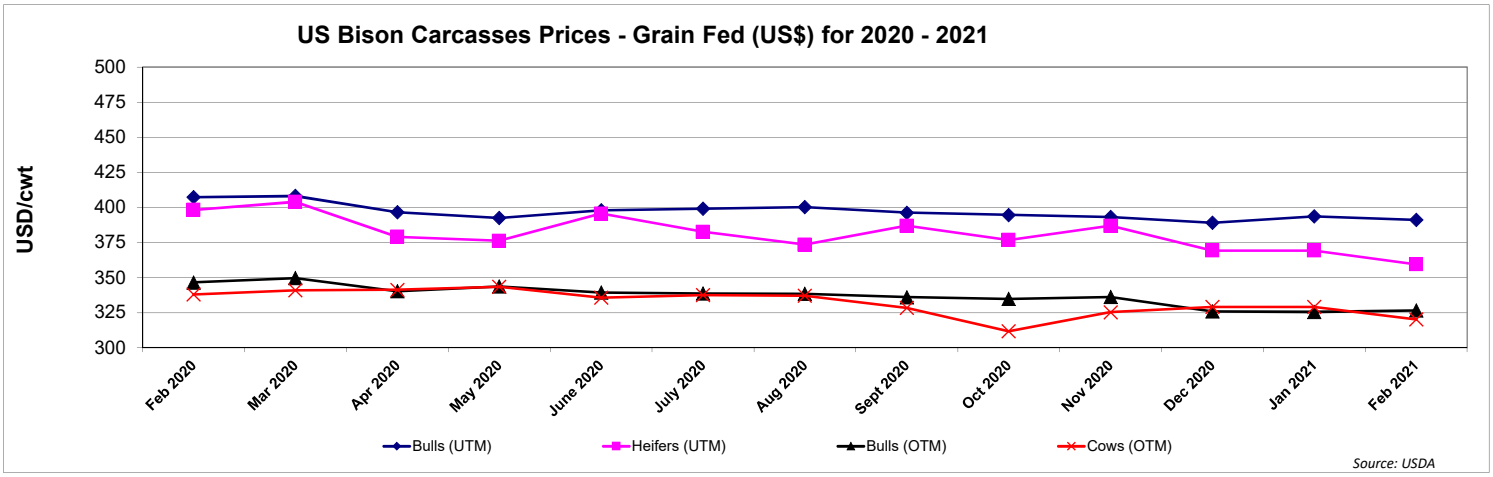


Chart 2



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