Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - April 21, 2021.

Weekly Federally Inspected Slaughter

	6-Mar	13-Mar	20-Mar	27-Mar	3-Apr	Mar Total	January - March YTD 2021	2020	% Change
Total Canada	*126*	*115*	*149*	*177*	*148*	**715**	**1,737**	**2,474**	**-29.8%**
previous year	*267*	*304*	*101*	*228*	*142*	***1,042***			

Provincially Inspected Slaughter

	October 2020	November 2020	December 2020	January 2021	February 2021	February 2020	January - February YTD 2021	2020	% Change
BC / Alberta	97	72	80	171	141	52	312	150	108.0%
Sask / Manitoba	40	33	28	32	29	24	61	52	17.3%
Ontario / Quebec	47	81	28	41	66	37	107	74	44.6%
Canada Total	**184**	**186**	**136**	**244**	**236**	**113**	**480**	**276**	**73.9%**

Note: In order to protect the confidentiality of individual abattoirs, the provincial groupings have changed.

	YTD 2021	YTD 2020	% 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 - February YTD 2021	2020	% Change
Total Slaughter	14,186	11,568	10,886	10,041	9,585	7,859	1,502	1,708	**-12.1%**
Total Live Exports	26,162	18,364	17,600	17,342	20,060	24,574	4,103	3,482	**17.8%**
Total Production	**40,348**	**29,932**	**28,486**	**27,383**	**29,645**	**32,433**	**5,605**	**5,190**	**8.0%**

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

US Federal Slaughter*

for week ending:	6-Mar	13-Mar	20-Mar	27-Mar	3-Apr	Mar Total	January - March YTD 2021	2020	% Change
	1,158	**1,301**	**1,143**	**1,381**	**1,234**	**6,217**	**16,071**	**15,048**	**6.8%**
previous year	997	1,063	1,179	1,589	1,457	***6,285***			

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

Canada Live Bison Exports to US

	October - 20	November - 20	December -20	January -21	February -21	March -21	January - March YTD 2021	2020	% Change
Slaughter Male	937	1,090	1,021	1,076	890	1,254	3,220	1,901	**69.4%**
Slaughter Female	721	560	786	588	515	799	1,902	1,757	**8.3%**
Feeder Male	80	0	3	124	324	924	1,372	1,254	**9.4%**
Feeder Female	49	0	9	159	427	531	1,117	666	**67.7%**
Total	**1,973**	**1,787**	**1,650**	**1,819**	**1,947**	**3,508**	**7,611**	**5,578**	**36.4%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		Sept 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	Feb 2021	January - February YTD 2021	2020	% Change
United States	Kg	7,943	7,552	23,035	4,404	43,256	28,532	**71,788**	**84,230**	**-14.8%**
	Value ($Cdn)	140,751	118,861	279,747	71,489	485,043	353,244	**838,287**	**979,990**	**-14.5%**
Mexico	Kg	-	-	-	-	35,515	-	**35,515**	**-**	**-**
	Value ($Cdn)	-	-	-	-	211,298	-	**211,298**	**-**	**-**
Saudi Arabia	Kg	-	-	-	-	-	24,490	**24,490**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	419,067	**419,067**	**-**	**-**
Germany	Kg	-	-	-	-	-	17,386	**17,386**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	131,417	**131,417**	**-**	**-**
Italy	Kg	373	-	-	-	-	495	**495**	**2,667**	**-81.4%**
	Value ($Cdn)	17,907	-	-	-	-	23,452	**23,452**	**98,859**	**-76.3%**
Switzerland	Kg	247	411	-	245	163	144	**307**	**1,642**	**-81.3%**
	Value ($Cdn)	10,972	20,910	-	10,652	7,558	2,328	**9,886**	**73,025**	**-86.5%**
Belgium	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Other Countries	Kg	-	850	469	1,394	-	-	**-**	**1,612**	**-**
	Value ($Cdn)	-	20,400	10,429	51,687	-	-	**-**	**65,955**	**-**
Total	**Kg**	**8,563**	**8,813**	**23,504**	**6,043**	**78,934**	**71,047**	**149,981**	**90,151**	**66.4%**
	Value ($Cdn)	**169,630**	**160,171**	**290,176**	**133,828**	**703,899**	**929,508**	**1,633,407**	**1,217,829**	**34.1%**

Bone-in		Sept 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	Feb 2021	January - February YTD 2021	2020	% Change
Total	**Kg**	**5,696**	**33,734**	**23,195**	**5,733**	**10,540**	**34,381**	**44,921**	**61,133**	**-26.5%**
	Value ($Cdn)	**59,795**	**409,387**	**243,548**	**74,480**	**109,096**	**519,405**	**628,501**	**641,902**	**-2.1%**

Total Exports, Boneless and Bone-in	Sept 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	Feb 2021	January - February YTD 2021	2020	% Change
Kg	**14,259**	**42,547**	**46,699**	**11,776**	**89,474**	**105,428**	**194,902**	**151,284**	**28.8%**
Value ($Cdn)	**229,425**	**569,558**	**533,724**	**208,308**	**812,995**	**1,448,913**	**2,261,908**	**1,859,731**	**21.6%**

**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)
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	363.69	338.64	310.79
Mar 2021	376.12	376.24	327.10	316.12

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Apr 2021	390-410	390-410	220-230	220-230

**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
Apr 2021	480-500	460-480

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

	January 2021		February 2021		March 2021		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,143 -1,195	1,154.10	1,135 - 1,182	1,154.44	1,142 - 1,223	1,196.51	3.7%	3.6%
Chuckroll/Clod Fresh	630 - 660	630.44	639 - 681	659.06	608 - 688	656.58	4.1%	-0.4%
Striploin Fresh	947 - 1,300	964.65	967 - 1,010	985.96	988 -1,041	1,001.15	3.8%	1.5%
Tenderloin Fresh	1,182 - 1,667	1,403.63	1,240 - 1,662	1,439.15	1,388 - 1,685	1,495.06	6.5%	3.9%
Grnd 85% Bulk, Frozen	520 - 733	615.26	N/A	N/A	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	540 - 733	646.92	520 - 706	591.40	520 - 706	591.40	-8.6%	0.0%

**source USDA*

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

	Mid-January 2021 Pricing	Mid-February 2021 Pricing	Mid-March 2021 Pricing	Mid-April 2021 Pricing
Tenderloin - Fresh	$45.00 - $56.00	$45.00 - $56.00	$45.00 - $56.00	$45.00 - $52.00
Strip Loin Boneless - Fresh	$26.00 - $28.00	$26.00 - $28.00	$26.00 - $28.00	$28.00 - $29.995
Inside Round - Fresh	$17.50 - $20.00	$17.50 - $19.00	$17.50 - $19.00	$17.50 - $21.00
Ground 90% Bulk Fresh	$16.25 - $16.25	$16.25 - $16.25	$16.25 - $16.25	$16.25 - $16.95
Fresh Bison Trim	$12.60 - $14.00	$12.60 - $14.00	$12.60 - $14.00	$11.95 - $12.00

**source CBA survey of marketers*

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

Jack Auction Group (SK) (Mar 29, 2021)
Head Sold: 368

Class	# of head	Average/lb
Bull Calves (625 Base)	39	$2
Heifer Calves (490 Base)	12	$2
Bull Calves (575 Base)	32	2.40
Heifer Calves (500 Base)	32	1.90
Bull Calves (540 Base)	92	2.26
Heifer Calves (485 Base)	69	1.79
Bull Calves (500 Base)	61	2.20
Heifer Calves (470 Base)	23	1.89
Bull Calves (475 Base)	31	2.06
Heifer Calves (425 Base)	33	1.66
Heifer Calves (440 Base)	11	1.76
Heifer Calves (425 Base)	47	1.56
Bull Calves (425 Base)	70	1.95
Heifer Calves (395 Base)	70	1.44
Bull Calves (420 Base)	65	1.71
Heifer Calves (385 Base)	61	1.16

Jack Auction Group (SK) (Mar 8, 2021)
Head Sold: 368

Class	# of head	Average/lb
2019 Bull Cross Breeding	1	$6,500
2019 Bull Wood Breeding	1	$6,100
2020 Bulls Cross (575 Base)	50	2.41
2020 Heifers Cross (500 Base)	50	2.11
2020 Bulls Cross (485 Base)	37	2.29
2020 Heifers Cross (425 Base)	35	1.61
Base)	31	2.38
2020 Heifers Plains (380 Base)	16	1.45
2020 Mixed Plains (400 Base)	32	1.70
2020 Mixed Plains (400 Base)	7	1.73
2020 Mixed Cross (425 Base)	10	1.70
2019 Bulls Plains (1025 Base)	50	2.25
2019 Heifers Cross (800 Base)	20	1.90
Cows Plains (950 Base)	10	1.20
Cows Cross (900 Base)	18	1.11

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
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

Mixed Yearlings (675 Base)	36	1.63
Yearling Heifers (645 Base)	50	1.50
Yearling Heifers (600 Base)	20	1.47

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
Base)	8	2.11
2020 Bulls Plains (375 Base)	17	2.07
2020 Heifers Plains (350 Base)	17	1.53
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 has shown signs of improvement. Canadian buyers are paying $3.90 - $4.10/lb. HHW on light trading. Buyers are paying $2.20 – $2.30/lb. HHW for mature cows. To April 10, 2021 there were 1,881 bison slaughtered at federally inspected plants in Canada – down 24% from the 2,482 slaughtered for the same period in 2020. There is an adequate supply of finished animals based on current demand.

Canadian buyers purchasing bulls for slaughter in the U.S. market are paying up to $5.00/lb. Canadian HHW 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.

Total live bison exports to the US for the first two months of 2021 at 4,032 head are 6.3% above the 3,792 exported in the first two months of 2020.

Statistics Canada data show total exports of boneless fresh and chilled bison for the first two months of 2021 at 149,981 Kg., up substantially from the 90,151 Kg. exported for the same period in 2020. Although there was a 15% drop in fresh and chilled bison exports to the U.S. there were gains in exports to the United Kingdom, Mexico and Saudi Arabia.

It is reported that most of the middle cuts are being sold but there is some build-up of trim and prime cuts. With the opening of restaurants in the U.S. it is reported that the demand is improving.

In the Canadian marketplace, fresh bison continues to be available through many of the major retail outlets in Canada as well as from farm gate market activities. Marketers also indicate that there is a sign of optimism when the restaurants are open.

Chart 1

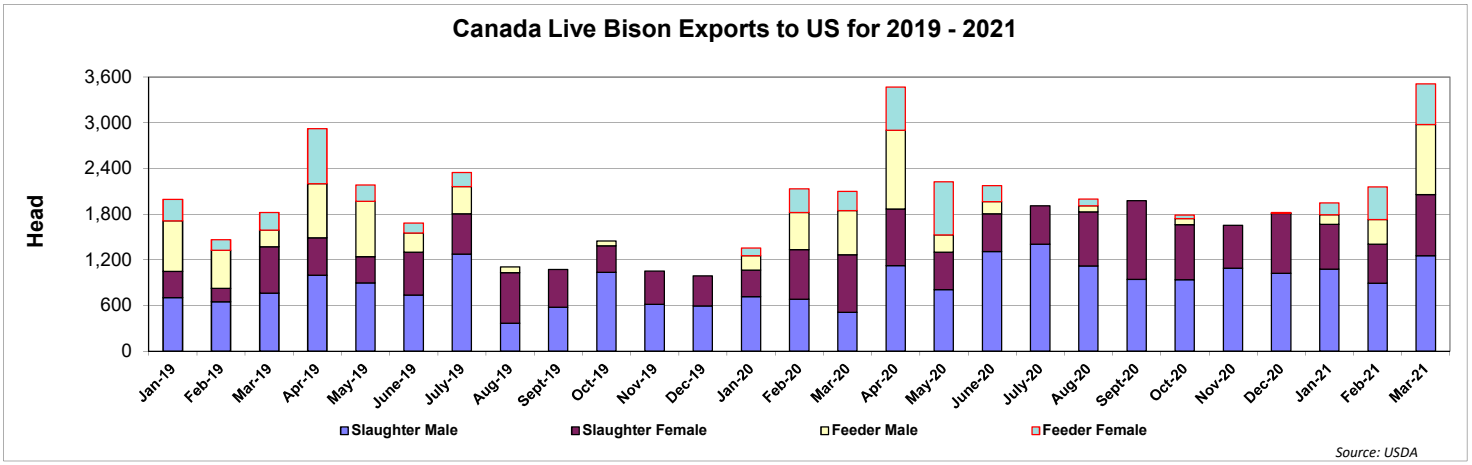
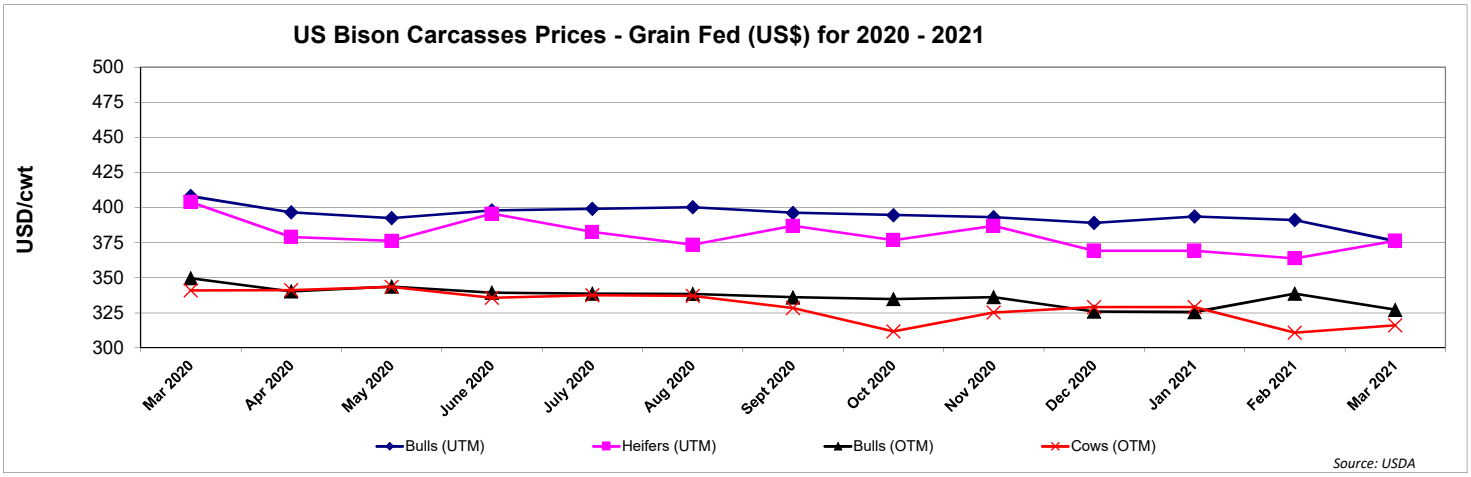


Chart 2



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