



BISON MARKET AND SUPPLY UPDATE

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

Weekly Federally Inspected Slaughter

	8-May	15-May	22-May	29-May	May Total	2021	2020	% Change
Total Canada	30	210	93	281	614	2,973	2,822	5.4%
previous year	2	54	2	185	243			

Provincially Inspected Slaughter

	December 2020	January 2021	February 2021	March 2021	April 2021	April 2020	2021	2020	% Change
BC / Alberta	80	179	147	76	115	88	517	311	66.2%
Sask / Manitoba	29	45	29	55	15	44	144	127	13.4%
Ontario / Quebec	28	41	66	24	52	75	183	200	-8.5%
Canada Total	137	265	242	155	182	207	844	638	32.3%

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 *	3,203	3,217	-0.4%

*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

	2015	2016	2017	2018	2019	2020	2021	2020	% Change
Total Slaughter	14,186	11,568	10,886	10,041	9,585	7,859	3,203	3,217	-0.4%
Total Live Exports	26,162	18,364	17,600	17,342	20,060	24,574	9,579	9,047	5.9%
Total Production	40,348	29,932	28,486	27,383	29,645	32,433	12,782	12,264	4.2%

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

US Federal Slaughter*

	8-May	15-May	22-May	29-May	May Total	2021	2020	% Change
for week ending:	1,179	1,302	1,560	1,330	5,371	26,659	25,400	5.0%
previous year	1,368	1,477	1,299	1,269	5,413			

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

Canada Live Bison Exports to US

	January -21	February -21	March -21	April -21	May 21	May - 20	2021	2020	% Change
Slaughter Male	1,076	890	1,254	813	1,262	806	5,295	3,828	38.3%
Slaughter Female	588	515	799	490	362	493	2,754	2,993	-8.0%
Feeder Male	124	324	924	491	736	225	2,599	2,513	3.4%
Feeder Female	159	427	531	174	495	700	1,786	1,937	-7.8%
Total	1,650	1,819	1,947	1,968	2,855	2,224	12,434	11,271	10.3%

*source : USDA, APHIS

Canadian Fresh or Chilled Bison Meat Exports

		Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	2021	2020	% Change
Boneless										
Saudi Arabia	Kg	-	-	-	24,490	74,546	24,953	123,989	-	
	Value (\$Cdn)	-	-	-	419,067	1,068,790	232,426	1,720,283	-	
United States	Kg	23,035	4,404	43,256	28,532	9,214	11,505	92,507	110,400	-16.2%
	Value (\$Cdn)	279,747	71,489	485,043	353,244	133,018	125,757	1,097,062	1,397,245	-21.5%
Germany	Kg	-	-	-	17,386	17,138	8,987	43,511	-	
	Value (\$Cdn)	-	-	-	131,417	128,270	86,654	346,341	-	
Mexico	Kg	-	-	35,515	-	-	-	35,515	-	
	Value (\$Cdn)	-	-	211,298	-	-	-	211,298	-	
Netherlands	Kg	-	-	-	-	-	645	645	2,136	-69.8%
	Value (\$Cdn)	-	-	-	-	-	4,832	4,832	62,512	-92.3%
Italy	Kg	-	-	-	495	-	-	495	2,667	-81.4%
	Value (\$Cdn)	-	-	-	23,452	-	-	23,452	98,859	-76.3%
Switzerland	Kg	-	245	163	144	-	-	307	2,515	-87.8%
	Value (\$Cdn)	-	10,652	7,558	2,328	-	-	9,886	113,346	-91.3%
Other Countries	Kg	469	1,394	-	-	-	-	-	3,719	-
	Value (\$Cdn)	10,429	51,687	-	-	-	-	-	126,220	-
Total	Kg	23,504	6,043	78,934	71,047	100,898	46,090	296,969	121,437	144.5%
	Value (\$Cdn)	290,176	133,828	703,899	929,508	1,330,078	449,669	3,413,154	1,798,182	89.8%

Bone-in

		Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	2021	2020	% Change
Total	Kg	23,195	5,733	10,540	34,381	21,350	2,395	68,666	62,069	10.6%
	Value (\$Cdn)	243,548	74,480	109,096	519,405	226,003	25,151	879,655	651,733	35.0%

Total Exports, Boneless and Bone-in

		Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	2021	2020	% Change
Kg		46,699	11,776	89,474	105,428	122,248	48,485	365,635	183,506	99.2%
	Value (\$Cdn)	533,724	208,308	812,995	1,448,913	1,556,081	474,820	4,292,809	2,449,915	75.2%

*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)
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
Apr 2021	384.92	363.57	318.07	311.21
May 2021	379.46	359.55	304.26	318.32

*source USDA

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows	For the U.S.Market	Bulls	Heifers
June 2020	350-400	350-375	250-300	250-300	June 2020	500	480
July 2020	350-400	350-375	250-325	250-325	July 2020	500	480
Aug 2020	350-400	350-375	250-325	250-325	Aug 2020	500	480
Sept 2020	350-400	350-375	250-325	250-325	Sept 2020	500-525	480-500
Oct 2020	350-400	350-375	250-325	250-325	Oct 2020	500-525	480-500
Nov 2020	350-380	350-380	225-325	225-325	Nov 2020	500-525	480-500
Dec 2020	350-380	350-380	225-325	225-325	Dec 2020	500-525	480-500
Jan 2021	350-380	350-380	180-195	180-195	Jan 2021	500-525	480-500
Feb 2021	350-380	350-380	180-195	180-195	Feb 2021	480-500	460-480
Mar 2021	370-410	350-380	190-220	190-220	Mar 2021	470-500	440-470
Apr 2021	390-410	390-410	220-230	220-230	Apr 2021	480-500	460-480
May 2021	400-415	390-415	220-230	220-230	May 2021	460-490	430-480
Jun 2021	400-415	390-415	225-230	230-250	Jun 2021	460-490	430-480

*source CBA survey of marketers

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

	March 2021		April 2021		May 2021		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mths prior	1 month prior
Ribeye Lip-On Fresh	1,142 - 1,223	1,196.51	1,163 - 1,244	1,224.66	1,165 - 1,325	1,243.37	3.9%	1.5%
Chuckroll/Clod Fresh	608 - 688	656.58	644 - 675	660.68	619 - 680	652.46	-0.6%	-1.2%
Striploin Fresh	988 - 1,041	1,001.15	934 - 1,250	1,009.24	991 - 1300	1,028.17	2.7%	1.9%
Tenderloin Fresh	1,388 - 1,685	1,495.06	1,297 - 1,747	1,438.92	1,340 - 1,752	1,474.08	-1.4%	2.4%
Grnd 85% Bulk, Frozen	N/A	N/A	590 - 678	647.72	530 - 730	621.62	N/A	-4.0%
Grnd 85% Patties, Fresh	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grnd 85% Patties, Frozen	520 - 706	591.40	595 - 740	643.71	540 - 704	597.02	1.0%	-7.3%

*source USDA

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

	Mid-March 2021 Pricing	Mid-April 2021 Pricing	Mid-May 2021 Pricing	Mid-June 2021 Pricing
Tenderloin - Fresh	\$45.00 - \$56.00	\$45.00 - \$52.00	\$45.00 - \$52.00	\$52.00 - \$56.90
Strip Loin Boneless - Fresh	\$26.00 - \$28.00	\$28.00 - \$29.995	\$28.00 - \$29.995	\$28.90 - \$30.00
Inside Round - Fresh	\$17.50 - \$19.00	\$17.50 - \$21.00	\$17.50 - \$21.00	\$19.90 - \$20.00
Ground 90% Bulk Fresh	\$16.25 - \$16.25	\$16.25 - \$16.95	\$16.25 - \$16.95	\$15.95 - \$17.75
Fresh Bison Trim	\$12.60 - \$14.00	\$11.95 - \$12.00	\$11.95 - \$12.00	\$13.95 - \$14.00

*source CBA survey of marketers

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

Jack Auction Group (SK) (May 31, 2021)			Ritchie Bros (SK) (May 5, 2021)			Jack Auction Group (SK) (Apr 27, 2021)		
Head Sold: 165			Head Sold: 526			Head Sold: 323		
Class	# of head	Average/lb	Class	# of head	Average/lb	Class	# of head	Average/lb
2020 Bulls Cross (475 Base)	36	\$1.77	2020 Bulls (600+)	51	\$2.16	2020 Bulls Cross (500 Base)	50	2.07
2020 Bulls Cross (530 Base)	12	\$1.76	2020 Bulls (500-599)	127	\$2.05	2020 Heifers Cross (500 Base)	21	2.29
2020 Heifers Cross (475 Base)	14	\$1.66	2020 Bulls (400-499)	40	\$1.52	2020 Mixed Cross (550 Base)	33	\$1.96
2020 Bulls Cross (720 Base)	52	\$1.96	2020 Bulls (300-399)	6	\$1.44	2020 Bulls Cross (575 Base)	47	\$2.16
2020 Heifers Cross (635 Base)	38	\$1.69	2019 Bulls Semen Tested (1400-1499)	2	\$3.50	2020 Heifers Cross (500 Base)	42	\$1.89
2020 Bulls Cross (690 Base)	7	\$1.96	2019 Bulls Semen Tested (1200-1299)	2	\$2.51	2020 Mixed Cross (550 Base)	8	\$1.71
2020 Mixed Cross (685 Base)	6	\$1.60	2019 Bulls (1000+)	1	\$2.14	2020 Mixed Cross (385 Base)	20	\$1.76
			2019 Bulls (750-899)	9	\$2.10	2020 Mixed Cross (350 Base)	45	\$1.69
			2019 Bulls (600-750)	9	\$1.52	2019 Mixed Cross (725 Base)	15	\$1.57
			2018 Bulls (1400+)	1	\$1.47	2019 Mixed Cross (700 Base)	12	\$1.81
			2018 Bulls (1100-1150)	1	\$1.72	2018 Mixed Cross (850 Base)	15	\$1.67
			2018 Bulls (900-999)	6	\$1.72		15	\$1.67
			2018 Bulls (800-899)	4	\$1.94			
			2020 Heifers (500-625)	108	\$1.65			
			2020 Heifers (400-499)	106	\$1.52			
			2020 Heifers (275-399)	12	\$1.14			
			2019 Heifers (800+)	3	\$1.80			

	2019 Heifers (700-799)	22	\$1.74	
	2019 Heifers (600-699)	12	\$1.31	
	2019 Heifers (450-499)	2	0.96	
	2018 Heifers (700+)	2	\$1.52	

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

There is more optimism in the Canadian bison marketplace as restaurants begin to open with expectations of a "more normal" summer. Canadian buyers are paying \$4.00 - \$4.15/lb. HHW for prime bulls and \$3.90 - \$4.15/lb. HHW on heifers on light trading. Buyers are paying \$2.20 - \$2.50/lb. HHW for mature cows and bulls. To June 12, 2021 there were 3,293 bison slaughtered at federally inspected plants in Canada - up 11.4% over the 2,957 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 \$4.90/lb. Canadian HHW when slaughter dates are available. Heifers are priced up to 40 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. US HHW 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 four months of 2021 at 9,579 head are 5.9% above the 9,047 exported in the first four months of 2020.

Marketers report that the demand for ribeyes is strong with the demand for tenderloin increasing. It is also reported that some marketers have extra inventory of bison trim as well as hip cuts. Demand in Europe and the U.S. is showing some strength.

In the Canadian marketplace, there has been increased demand with the expectation that this demand will increase over the summer.

Chart 1

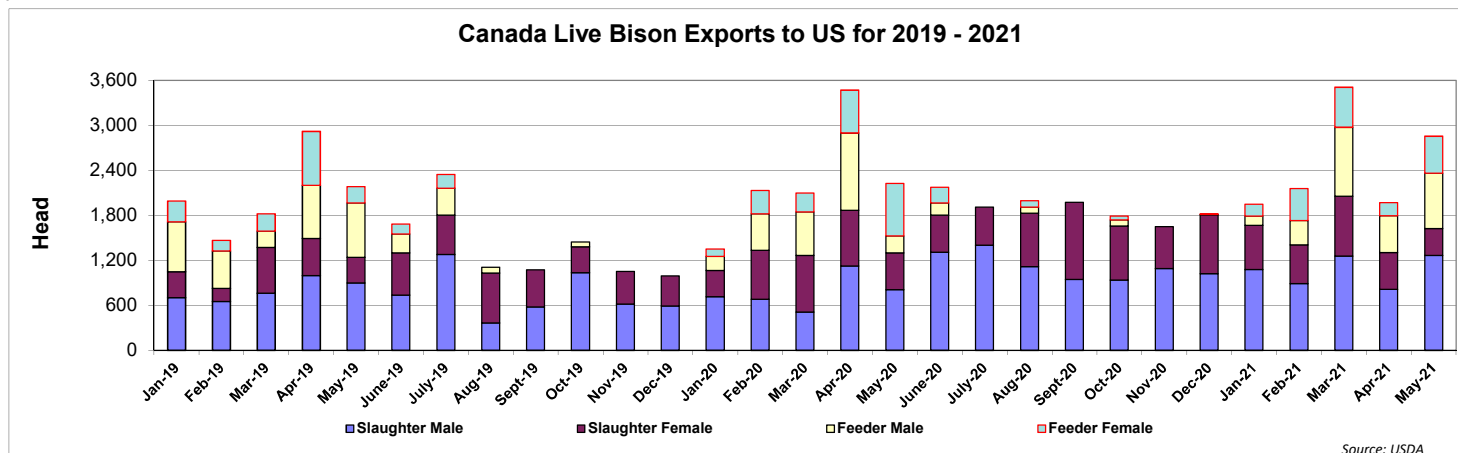
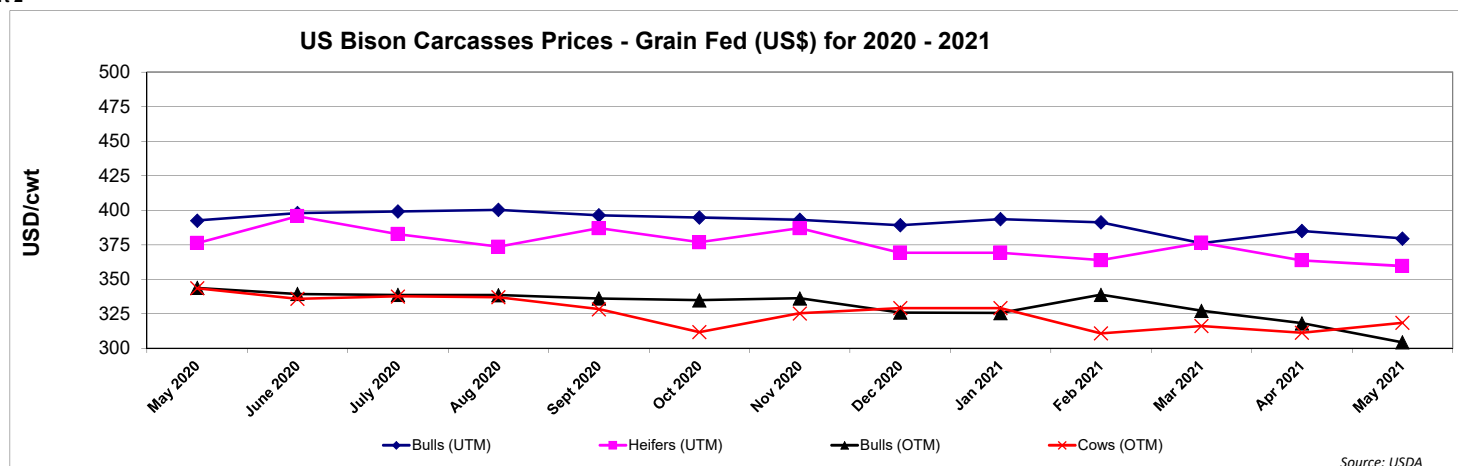


Chart 2



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 disclose the number of bison