



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - August 22, 2021.

Weekly Federally Inspected Slaughter

	10-Jul	17-Jul	24-Jul	31-Jul	July Total	2021	2020	% Change
Total Canada	216	61	153	102	532	4,271	3,530	21.0%
previous year	63	180	104	111	458			

Provincially Inspected Slaughter

	February 2021	March 2021	April 2021	May 2021	June 2021	June 2020	2021	2020	% Change
BC / Alberta	147	190	115	82	125	115	838	501	67.3%
Sask / Manitoba	30	57	15	41	32	67	220	228	-3.5%
Ontario / Quebec	66	63	52	55	48	49	325	280	16.1%
Canada Total	243	310	182	178	205	231	1,118	1,009	10.8%

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

	June	YTD 2021	YTD 2020	% Change
Total Canadian Federal and Provincial Slaughter *		4,857	4,081	19.0%

*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	2021	2020	% Change
Total Slaughter	14,186	11,568	10,886	10,041	9,585	7,859	4,857	4,081	19.0%
Total Live Exports	26,162	18,364	17,600	17,342	20,060	24,574	14,877	13,443	10.7%
Total Production	40,348	29,932	28,486	27,383	29,645	32,433	19,734	17,524	12.6%

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

US Federal Slaughter*

	10-Jul	17-Jul	24-Jul	31-Jul	July Total	2021	2020	% Change
for week ending:	1,005	1,297	1,324	1,323	4,949	37,551	36,122	4.0%
previous year	1,203	1,144	1,341	1,124	4,812			

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

Canada Live Bison Exports to US

	March -21	April -21	May 21	June 21	July 21	July - 20	2021	2020	% Change
Slaughter Male	1,254	813	1,262	985	935	1,402	7,215	6,536	10.4%
Slaughter Female	799	490	362	959	602	506	4,315	3,994	8.0%
Feeder Male	924	491	736	399	300	0	3,298	2,674	23.3%
Feeder Female	531	174	495	100	0	0	1,886	2,147	-12.2%
Total	3,508	1,968	2,855	2,443	1,837	1,908	16,714	15,351	8.9%

*source : USDA, APHIS

Canadian Fresh or Chilled Bison Meat Exports

Please note the bison meat export data is currently under review and therefore the data below is an estimate.

								January - June YTD		
								2021	2020	% Change
Boneless										
United States	Kg	43,256	28,532	9,214	11,505	15,983	16,985	125,475	130,228	-3.6%
	Value (\$Cdn)	485,043	353,244	133,018	125,757	232,344	207,102	1,536,508	1,688,538	-9.0%
Netherlands	Kg	-	-	-	645	731	4,652	6,028	2,136	182.2%
	Value (\$Cdn)	-	-	-	4,832	30,434	119,964	155,230	62,512	148.3%
Switzerland	Kg	163	144	-	-	614	1,673	2,594	3,269	-20.6%
	Value (\$Cdn)	7,558	2,328	-	-	25,290	63,875	99,051	148,292	-33.2%
Italy	Kg	-	495	-	-	399	1,389	2,283	3,190	-28.4%
	Value (\$Cdn)	-	23,452	-	-	12,067	62,295	97,814	112,723	-13.2%
France	Kg	-	-	-	-	105	2,091	2,196	4,239	-48.2%
	Value (\$Cdn)	-	-	-	-	2,987	57,502	60,489	117,817	-48.7%
Belgium	Kg	-	-	-	-	-	1,942	1,942	795	144.3%
	Value (\$Cdn)	-	-	-	-	-	18,310	18,310	28,705	-36.2%
Germany	Kg	-	-	-	-	182	551	733	-	-
	Value (\$Cdn)	-	-	-	-	8,376	21,083	29,459	-	-
Other Countries	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Total	Kg	43,419	29,171	9,214	12,150	18,014	29,283	141,251	143,857	-1.8%
	Value (\$Cdn)	492,601	379,024	133,018	130,589	311,498	550,131	1,996,861	2,158,587	-7.5%

Bone-in

	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021	2021	2020	% Change
Total	10,540	16,213	21,350	2,395	6,339	1,286	58,123	15,477	275.5%
	109,096	170,242	226,003	25,151	66,563	13,504	610,559	162,509	275.7%

Total Exports, Boneless and Bone-in

	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021	2021	2020	% Change
Kg	53,959	45,384	30,564	14,545	24,353	30,569	199,374	159,334	25.1%
Value (\$Cdn)	601,697	549,266	359,021	155,740	378,061	563,635	2,607,420	2,321,096	12.3%

*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)
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
Jun 2021	389.34	358.62	321.45	314.57
Jul 2021	381.61	358.35	304.32	320.46

*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
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
Jul 2021	400-415	390-415	225-230	230-250	Jul 2021	460-490	430-480
Aug 2021	400-415	390-415	225-230	220-230	Aug 2021	460-480	430-480

*source CBA survey of marketers

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

	May 2021		June 2021		July 2021		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,165 - 1,325	1,243.37	1,167 - 1,600	1,251.48	1,190 - 1,407	1,310.39	5.4%	4.7%
Chuckroll/Clod Fresh	619 - 680	652.46	621 - 720	651.99	631 - 663	652.91	0.1%	0.1%
Striploin Fresh	991 - 1300	1,028.17	948 - 1,127	1,038.05	982 - 1,207	1,110.36	8.0%	7.0%
Tenderloin Fresh	1,340 - 1,752	1,474.08	1,351 - 2,100	1,570.33	1,398 - 2,132	1,648.17	11.8%	5.0%
Grnd 85% Bulk, Frozen	530 - 730	621.62	575 - 740	625.70	570 - 749	630.49	1.4%	0.8%
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 - 704	597.02	590 - 727	628.44	590 - 737	637.56	6.8%	1.5%

*source USDA

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

	Mid-May 2021 Pricing	Mid-June 2021 Pricing	Mid-July 2021 Pricing	Mid-August 2021 Pricing
Tenderloin - Fresh	\$45.00 - \$52.00	\$52.00 - \$56.90	\$49.95 - \$56.90	\$35.00 - \$49.95
Strip Loin Boneless - Fresh	\$28.00 - \$29.995	\$28.90 - \$30.00	\$28.90 - \$30.00	\$25.00 - \$28.90
Inside Round - Fresh	\$17.50 - \$21.00	\$19.90 - \$20.00	\$17.95 - \$20.00	\$17.95 - \$19.00
Ground 90% Bulk Fresh	\$16.25 - \$16.95	\$15.95 - \$17.75	\$15.95 - \$17.75	\$15.95 - \$17.75
Fresh Bison Trim	\$11.95 - \$12.00	\$13.95 - \$14.00	\$11.95 - \$14.00	\$11.95 - \$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) Head Sold: 165			Ritchie Bros (SK) (May 5, 2021) Head Sold: 526			Jack Auction Group (SK) (Apr 27, 2021) 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)	15	\$1.57
			2019 Bulls (600-750)	9	\$1.52	2019 Mixed Cross (725 Base)	12	\$1.81
			2018 Bulls (1400+)	1	\$1.47	2019 Mixed Cross (700 Base)	15	\$1.67
			2018 Bulls (1100-1150)	1	\$1.72	2018 Mixed Cross (850 Base)	15	\$1.67
			2018 Bulls (900-999)	6	\$1.72			
			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 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 market optimism of the spring has given way to concerns about poor pastures and limited feed supplies as a result of the drought. Nevertheless Canadian buyers are paying \$4.00 - \$4.15/lb. HHW for prime bulls and \$3.90 - \$4.15/lb. HHW for heifers on light trading. Buyers are paying \$2.20 - \$2.50/lb. HHW for mature cows and bulls. To August 14, 2021 there were 4,544 bison slaughtered at federally inspected plants in Canada – up 23% over the 3,708 slaughtered for the same period in 2020 and 10.4% below the 5,074 slaughtered in 2019. There is an adequate supply of finished animals based on current demand. The present dry conditions in western Canada are a concern for a number of producers as they expect lower calf prices and higher feed costs.

Canadian buyers purchasing bulls for slaughter in the U.S. market are paying up to \$4.80/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 six months of 2021 at 14,877 head are 10.7% above the 13,443 exported in the first six months of 2020.

Marketers steady demand for ribeyes and tenderloin. 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. continue to show strength.

In the Canadian marketplace, consumers continue to have access to fresh and frozen bison products in many of the major food chains from coast to coast. Farm direct producers and several local online platforms continue to serve those consumers who focus on regional products.

Chart 1

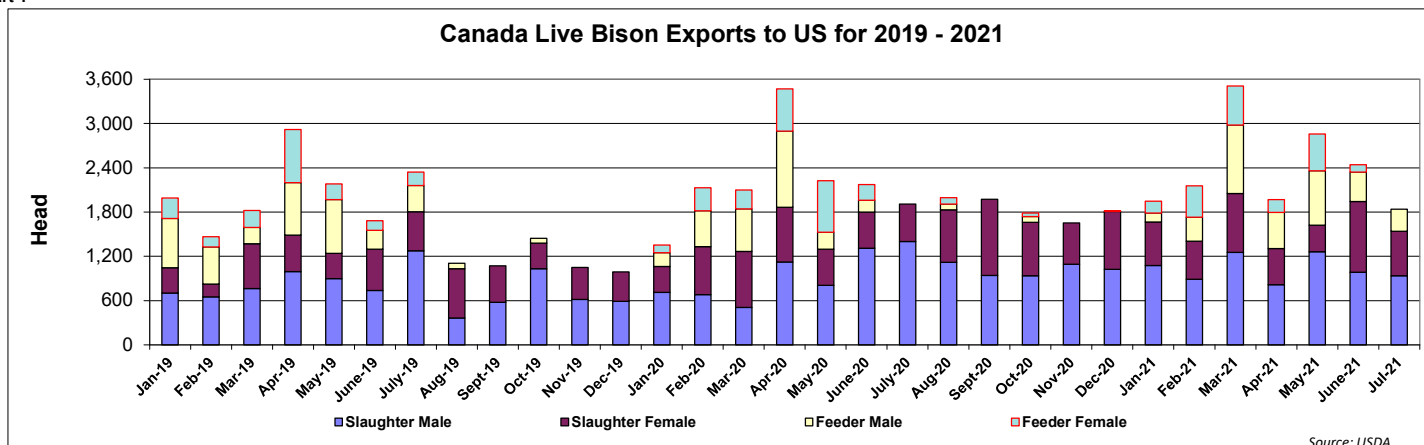
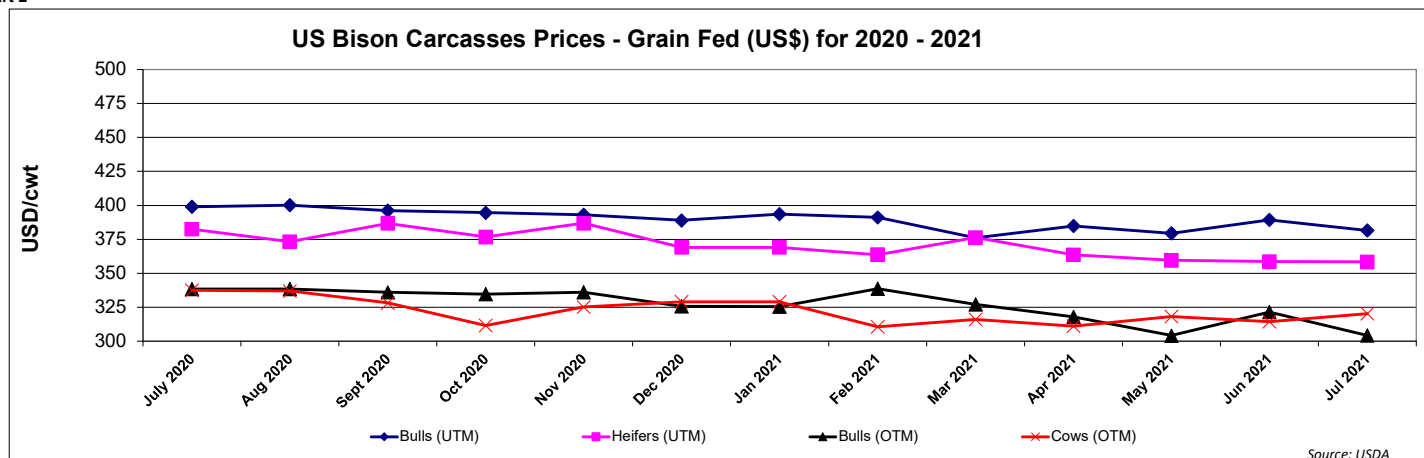


Chart 2



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