



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - October 18, 2021.

Weekly Federally Inspected Slaughter

	4-Sep	11-Sep	18-Sep	25-Sep	2-Oct	September Total	January - September YTD		
Total Canada	227	227	133	55	321	963	2021	2020	% Change
previous year	163	58	152	117	152	642	5,733	4,592	24.8%

Provincially Inspected Slaughter

	April 2021	May 2021	June 2021	July 2021	August 2021	August 2020	January - August YTD		
BC / Alberta	115	82	125	100	112	70	2021	2020	% Change
Sask / Manitoba	15	41	32	39	63	48	1,051	659	59.5%
Ontario / Quebec	52	55	48	47	64	55	330	331	-0.3%
Canada Total	182	178	205	186	239	173	413	376	9.8%
							1,794	1,366	31.3%

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

	August	YTD 2021	YTD 2020	% Change
Total Canadian Federal and Provincial Slaughter *		6,564	5,316	23.5%

*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 - August YTD		
Total Slaughter	14,186	11,568	10,886	10,041	9,585	7,859	2021	2020	% Change
Total Live Exports	26,162	18,364	17,600	17,342	20,060	24,574	6,564	5,316	23.5%
Total Production	40,348	29,932	28,486	27,383	29,645	32,433	18,476	17,345	6.5%
							25,040	22,661	10.5%

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

US Federal Slaughter*

	4-Sep	11-Sep	18-Sep	25-Sep	2-Oct	September Total	January - September YTD		
for week ending:	1,265	974	1,332	1,341	1,438	6,350	2021	2020	% Change
previous year	1,193	1,115	945	1,112	1,128	5,493	48,581	46,426	4.6%

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

Canada Live Bison Exports to US

	May 21	June 21	July 21	August 21	September 21	September 20	January - September YTD		
Slaughter Male	1,262	985	935	1,054	1,031	943	2021	2020	% Change
Slaughter Female	362	959	602	568	649	1,030	9,300	8,595	8.2%
Feeder Male	736	399	300	65	246	0	5,532	5,737	-3.6%
Feeder Female	495	100	0	75	84	0	3,609	2,754	31.0%
Total	2,855	2,443	1,837	1,762	2,010	1,973	2,045	2,232	-8.4%
							20,486	19,318	6.0%

*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 - August YTD		
Boneless								2021	2020	% Change
United States	Kg	9,214	11,505	15,983	16,985	12,099	54,215	191,789	147,853	29.7%
	Value (\$Cdn)	133,018	125,757	232,344	207,102	186,781	817,880	2,541,169	1,974,673	28.7%
Netherlands	Kg	-	645	731	4,652	2,441	5,800	14,269	2,136	568.0%
	Value (\$Cdn)	-	4,832	30,434	119,964	71,317	140,541	367,088	62,512	487.2%
Switzerland	Kg	-	-	814	1,673	1,628	7,586	11,808	3,674	221.4%
	Value (\$Cdn)	-	-	25,290	63,875	67,889	137,083	304,023	165,850	83.3%
Italy	Kg	-	-	399	1,389	1,051	666	4,000	4,221	-5.2%
	Value (\$Cdn)	-	-	12,067	62,295	50,253	30,608	178,675	149,755	19.3%
France	Kg	-	-	105	2,091	159	-	2,355	5,915	-60.2%
	Value (\$Cdn)	-	-	2,987	57,502	2,876	-	63,365	163,393	-61.2%
Germany	Kg	-	-	182	551	-	-	733	-	-
	Value (\$Cdn)	-	-	8,376	21,083	-	-	29,459	-	-
United Kingdom	Kg	-	-	-	210	-	-	210	-	-
	Value (\$Cdn)	-	-	-	10,900	-	-	10,900	-	-
Other Countries	Kg	-	-	-	-	-	-	-	795	-
	Value (\$Cdn)	-	-	-	-	-	-	-	28,705	-
Total	Kg	9,214	12,150	18,014	27,551	17,378	68,267	225,164	164,594	36.8%
	Value (\$Cdn)	133,018	130,589	311,498	542,721	379,116	1,126,112	3,494,679	2,544,888	37.3%

Bone-in

								January - August YTD		
Total								2021	2020	% Change
	Kg	21,350	2,395	6,339	1,286	7,279	1,306	84,876	90,477	-6.2%
	Value (\$Cdn)	226,003	25,151	66,563	13,504	109,707	15,175	1,084,604	949,142	14.3%

Total Exports, Boneless and Bone-in

								January - August YTD		
								2021	2020	% Change
	Kg	30,564	14,545	24,353	28,837	24,657	69,573	310,040	255,071	21.6%
	Value (\$Cdn)	359,021	155,740	378,061	556,225	488,823	1,141,287	4,579,283	3,494,030	31.1%

*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)
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
Aug 2021	390.52	358.82	307.73	309.14
Sep 2021	387.56	359.20	330.00	317.68

*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
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
Sept 2021	410-415	385-415	225-230	220-230	Sept 2021	460-480	430-480
Oct 2021	410-415	390-415	225-230	220-230	Oct 2021	460-480	430-480

*source CBA survey of marketers

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

	July 2021		August 2021		September 2021		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,190 - 1,407	1,310.39	1,201 - 1,438	1,330.87	1,228 - 1,450	1,356.62	3.5%	1.9%
Chuckroll/Clod Fresh	631 - 663	652.91	605 - 662	638.43	640 - 830	652.76	0.0%	2.2%
Striploin Fresh	982 - 1,207	1,110.36	981 - 1,262	1,132.26	1,112 - 1,300	1,131.27	1.9%	-0.1%
Tenderloin Fresh	1,398 - 2,132	1,648.17	1,426 - 2,175	1,658.60	1,440 - 2,238	1,731.63	5.1%	4.4%
Grnd 85% Bulk, Frozen	570 - 749	630.49	N/A	N/A	595 - 726	647.11	2.6%	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	590 - 737	637.56	600 - 754	753.74	610 - 727	671.95	5.4%	-10.9%

*source USDA

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

	Mid-July 2021 Pricing	Mid-August 2021 Pricing	Mid-September 2021 Pricing	Mid-October 2021 Pricing
Tenderloin - Fresh	\$49.95 - \$56.90	\$35.00 - \$49.95	\$35.00 - \$60.00	\$35.00 - \$60.00
Strip Loin Boneless - Fresh	\$28.90 - \$30.00	\$25.00 - \$28.90	\$25.00 - \$35.00	\$25.00 - \$35.00
Inside Round - Fresh	\$17.95 - \$20.00	\$17.95 - \$19.00	\$17.95 - \$19.00	\$17.95 - \$21.90
Ground 90% Bulk Fresh	\$15.95 - \$17.75	\$15.95 - \$17.75	\$15.95 - \$17.75	\$15.95 - \$17.75
Fresh Bison Trim	\$11.95 - \$14.00	\$11.95 - \$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)			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			
			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@agr.gc.ca

Prices for finished bison continue to be stable with Canadian buyers paying \$4.00 - \$4.15/lb. HHW for finished prime bulls and \$3.90 - \$4.15/lb. HHW for heifers on light trading.

Buyers are paying \$2.20 - \$2.30/lb. HHW for mature cows and bulls.

Canadian buyers purchasing bulls for slaughter in the U.S. 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 must be adjusted for quality, transportation, exchange rates and export costs.

To October 16, 2021 there were 5,870 bison slaughtered at federally inspected plants in Canada – up 22.4% over the 4,802 slaughtered for the same period in 2020 and 8.1% below the 6,384 slaughtered in 2019 during the same period. There is an adequate supply of finished animals based on current demand.

U.S. buyers are offering up to \$4.00 /lb. U.S. HHW for prime bulls and up to \$3.80 /lb. U.S. 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 eight months of 2021 at 18,476 head are 6.5% above the 17,345 exported in the first eight months of 2020.

Marketers see steady demand for middle cuts. It is also reported that certain marketers have extra inventory of bison trim. Demand in Europe and the U.S. continues to be steady.

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. Canadian marketers indicate that the demand is stronger in select markets with wholesale prices showing quite wide price ranges. Farm direct producers and several local online platforms continue to serve those consumers who focus on regional products. The strength of the local markets resulted in provincially inspected slaughter for the first seven months of 2021 at 1,576 head being 32.1% above the 1,193 slaughtered for the same period in 2020 and 73.4% above the 908 slaughtered in 2019.

Chart 1

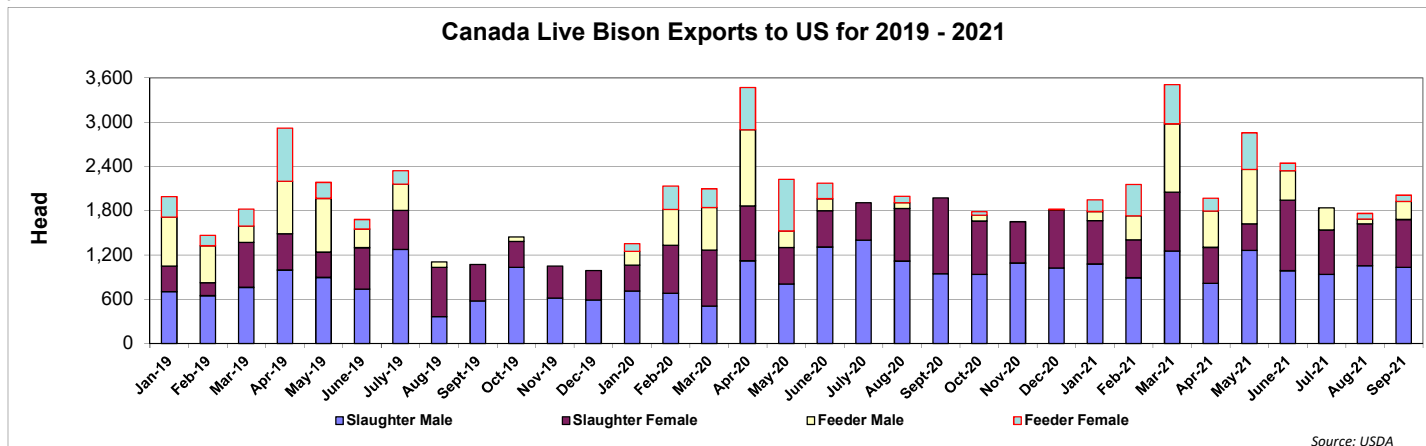
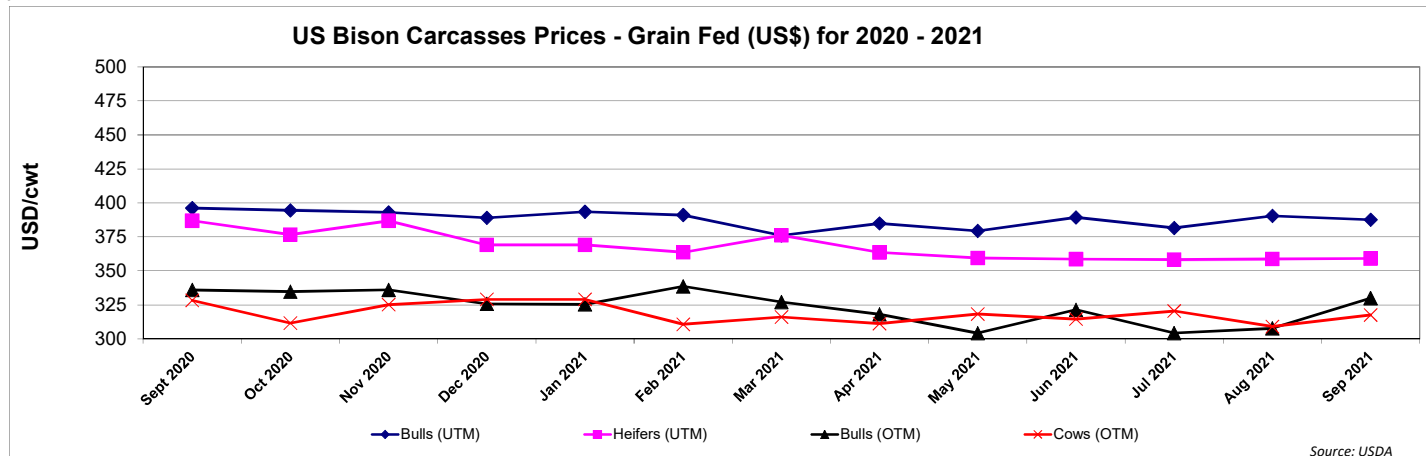


Chart 2



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