Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

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

Weekly Federally Inspected Slaughter

	9-Oct	16-Oct	23-Oct	30-Oct	October Total	January - October YTD 2021	2020	% Change
Total Canada	*52*	*92*	*150*	*242*	**536**	**6,112**	**5,099**	**19.9%**
previous year	*95*	*161*	*111*	*140*	***507***			

Provincially Inspected Slaughter

	May 2021	June 2021	July 2021	August 2021	September 2021	September 2020	January - September YTD 2021	2020	% Change
BC / Alberta	82	125	100	112	121	59	1,172	718	63.2%
Sask / Manitoba	41	32	47	63	42	42	372	373	-0.3%
Ontario / Quebec	55	48	47	64	63	33	499	409	22.0%
Canada Total	**178**	**205**	**194**	**239**	**226**	**134**	**2,043**	**1,500**	**36.2%**

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

	September	YTD 2021	YTD 2020	% Change
Total Canadian Federal and Provincial Slaughter *		**7,619**	**6,092**	**25.1%**

**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 - September YTD 2021	2020	% Change
Total Slaughter	14,186	11,568	10,886	10,041	9,585	7,860	7,619	6,092	**25.1%**
Total Live Exports	26,162	18,364	17,600	17,342	20,060	24,574	20,486	19,318	**6.0%**
Total Production	**40,348**	**29,932**	**28,486**	**27,383**	**29,645**	**32,433**	**28,105**	**25,410**	**10.6%**

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

US Federal Slaughter*

for week ending:	9-Oct	16-Oct	23-Oct	30-Oct	October Total	January - October YTD 2021	2020	% Change
	1,336	**1,338**	**1,542**	**1,227**	**5,443**	**54,024**	**51,341**	**5.2%**
previous year	1,198	1,115	1,265	1,337	***4,915***			

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

Canada Live Bison Exports to US

	June 21	July 21	August 21	September 21	October 21	October 20	January - October YTD 2021	2020	% Change
Slaughter Male	985	935	1,054	1,031	763	937	10,063	9,532	**5.6%**
Slaughter Female	959	602	568	649	662	721	6,194	6,458	**-4.1%**
Feeder Male	399	300	65	246	614	80	4,223	2,834	**49.0%**
Feeder Female	100	0	75	84	23	49	2,068	2,281	**-9.3%**
Total	**2,443**	**1,837**	**1,762**	**2,010**	**2,062**	**1,787**	**22,548**	**21,105**	**6.8%**

**source : USDA, APHIS*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	January - September YTD 2021	2020	% Change
United States	Kg	11,505	15,983	16,985	12,099	54,215	32,256	**224,045**	**155,796**	**43.8%**
	Value ($Cdn)	125,757	232,344	207,102	186,781	817,880	571,250	**3,112,419**	**2,115,424**	**47.1%**
Netherlands	Kg	645	731	4,652	2,441	5,800	3,075	**17,344**	**2,136**	**712.0%**
	Value ($Cdn)	4,832	30,434	119,964	71,317	140,541	79,921	**447,009**	**62,512**	**615.1%**
Switzerland	Kg	-	614	1,673	1,628	7,586	268	**12,076**	**3,921**	**208.0%**
	Value ($Cdn)	-	25,290	63,875	67,889	137,083	12,208	**316,231**	**176,822**	**78.8%**
Italy	Kg	-	399	1,389	1,051	666	659	**4,659**	**4,594**	**1.4%**
	Value ($Cdn)	-	12,067	62,295	50,253	30,608	28,491	**207,166**	**167,662**	**23.6%**
France	Kg	-	105	2,091	159	-	760	**3,115**	**5,915**	**-47.3%**
	Value ($Cdn)	-	2,987	57,502	2,876	-	27,506	**90,871**	**163,393**	**-44.4%**
Germany	Kg	-	182	551	-	-	-	**733**	-	-
	Value ($Cdn)	-	8,376	21,083	-	-	-	**29,459**	-	-
United Kingdom	Kg	-	-	210	-	-	422	**632**	-	-
	Value ($Cdn)	-	-	10,900	-	-	18,429	**29,329**	-	-
Other Countries	Kg	-	-	-	-	-	-	-	**795**	-
	Value ($Cdn)	-	-	-	-	-	-	-	**28,705**	-
Total	**Kg**	**12,150**	**18,014**	**27,551**	**17,378**	**68,267**	**37,440**	**262,604**	**173,157**	**51.7%**
	Value ($Cdn)	**130,589**	**311,498**	**542,721**	**379,116**	**1,126,112**	**737,805**	**4,232,484**	**2,714,518**	**55.9%**

Bone-in		Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	January - September YTD 2021	2020	% Change
Total	**Kg**	**2,395**	**6,339**	**1,286**	**7,279**	**1,306**	**119**	**84,995**	**96,173**	**-11.6%**
	Value ($Cdn)	**25,151**	**66,563**	**13,504**	**109,707**	**15,175**	**1,250**	**1,085,854**	**1,008,937**	**7.6%**

Total Exports, Boneless and Bone-in		Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	January - September YTD 2021	2020	% Change
	Kg	**14,545**	**24,353**	**28,837**	**24,657**	**69,573**	**37,559**	**347,599**	**269,330**	**29.1%**
	Value ($Cdn)	**155,740**	**378,061**	**556,225**	**488,823**	**1,141,287**	**739,055**	**5,318,338**	**3,723,455**	**42.8%**

**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)
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
Oct 2021	384.82	369.87	325.85	N/A

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
May 2021	400-415	390-415	220-230	220-230
Jun 2021	400-415	390-415	225-230	230-250
Jul 2021	400-415	390-415	225-230	230-250
Aug 2021	400-415	390-415	225-230	220-230
Sept 2021	410-415	385-415	225-230	220-230
Oct 2021	410-415	390-415	225-230	220-230
Nov 2021	375-415	375-415	200-230	200-230

**source CBA survey of marketers*

For the U.S.Market

	Bulls	Heifers
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
May 2021	460-490	430-480
Jun 2021	460-490	430-480
Jul 2021	460-490	430-480
Aug 2021	460-480	430-480
Sept 2021	460-480	430-480
Oct 2021	460-480	430-480
Nov 2021	460-480	430-480

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

	August 2021		September 2021		October 2021		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 mnths prior	1 month prior
Ribeye Lip-On Fresh	1,201 - 1,438	1,330.87	1,228 - 1,450	1,356.62	1,122 - 1,478	1,409.43	5.9%	3.9%
Chuckroll/Clod Fresh	605 - 662	638.43	640 - 830	652.76	N/A	N/A	N/A	N/A
Striploin Fresh	981 - 1,262	1,132.26	1,112 - 1,300	1,131.27	1,026 - 1,171	1,117.40	-1.3%	-1.2%
Tenderloin Fresh	1,426 - 2,175	1,658.60	1,440 - 2,238	1,731.63	1,602 - 2,115	1,788.73	7.8%	3.3%
Grnd 85% Bulk, Frozen	N/A	N/A	595 - 726	647.11	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	600 - 754	753.74	610 - 727	671.95	717 - 742	736.95	-2.2%	9.7%

**source USDA*

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

	Mid-August 2021 Pricing	Mid-September 2021 Pricing	Mid-October 2021 Pricing	Mid-November 2021 Pricing
Tenderloin - Fresh	$35.00 - $49.95	$35.00 - $60.00	$35.00 - $60.00	$35.00 - $50.00
Strip Loin Boneless - Fresh	$25.00 - $28.90	$25.00 - $35.00	$25.00 - $35.00	$25.00 - $35.50
Inside Round - Fresh	$17.95 - $19.00	$17.95 - $19.00	$17.95 - $21.90	$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) (Nov 4, 2021)
Head Sold: 526

Class	# of head	Average/lb
2020 Bulls Plains(650)	10	$1.24
2019 Mixed Plains(750)	38	$1.52
2020 Mixed Cross(650)	13	Pass
Mature Cows Cross(875)	10	$0.96
2020 Bulls Plains(735)	8	$1.22
2020 Heifers Plains(590)	9	$1.05
Mature Cows Plains(990)	3	$0.80
Mature Bulls Plains(1735)	2	$0.65
2018 Heifers Cross(900)	10	Pass
Mature Mix Cross(925)	12	Pass
Mature Bull Cross(2000)	1	Pass

Jack Auction Group (SK) (Oct 13, 2021)
Head Sold: 526

Class	# of head	Average/lb
2020 Bulls Cross(975)	24	$2.11
2020 Bulls Cross(875)	26-28	$1.78
2020 Bulls Cross(750)	25	$2.24
2020 Bulls Cross(635)	27	$1.62
2020 Bulls Cross(575)	50-60	$1.50
2020 Heifers Cross(825)	22	$1.84
2020 Heifers Cross(825)	20-22	$1.72
2020 Heifers Cross(700)	53	$1.59
2020 Heifers Cross(550)	28	$1.50
2020 Mix Cross(800)	12	$1.46
2020 Bulls Plains(625)	50	$1.39
2020 Mixed Cross (650)	31	Pass
2018 Bulls Cross (1125)	6	$1.75
2019 Heifers Cross (1000)	10	$1.69
2017-19 Bulls Cross (800)	18	$1.21
2017-19 Heiferss Cross (800)	19	$1.11
Mature Cows Cross	29	$0.86

Jack Auction Group (SK) (May 31, 2021)
Head Sold: 165

Class	# of head	Average/lb
2020 Bulls Cross (475 Base)	36	$1.77
2020 Bulls Cross (530 Base)	12	$1.76
2020 Heifers Cross (475 Base)	14	$1.66
2020 Bulls Cross (720 Base)	52	$1.96
2020 Heifers Cross (635 Base)	38	$1.69
2020 Bulls Cross (690 Base)	7	$1.96
2020 Mixed Cross (685 Base)	6	$1.60

	Mature Mixed Cross (1113)	4	$0.90	

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 $3.75 - $4.15/lb. HHW for finished prime bulls and $3.75 - $4.15/lb. HHW for heifers on light trading. Buyers are paying $2.00 – $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 November 20, 2021 there were 6,652 bison slaughtered at federally inspected plants in Canada – up 23.4% over the 5,349 slaughtered for the same period in 2020 and 5.9% below the 7,069 slaughtered in 2019 during the same period. There is a surplus 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 have seen a strong demand for middle cuts as Christmas orders are filled. There is strong European demand with competition from the U.S. Canadian bison meat exports to the U.S. have been reduced substantially. There has been a burdensome build up of trim in Canada with reported increases in the trim inventory in the U.S. as well.

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.

Chart 1

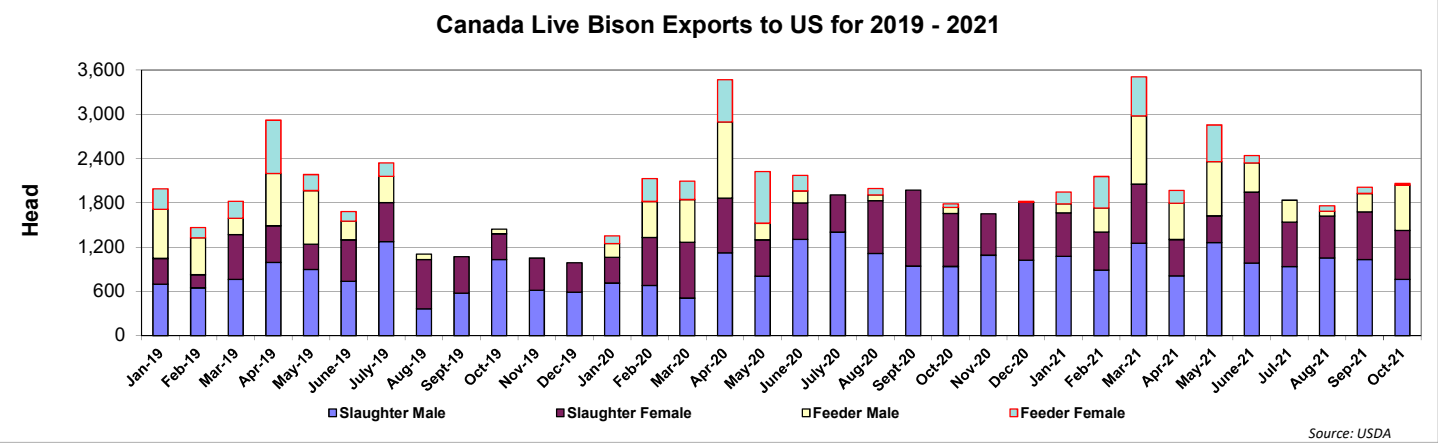
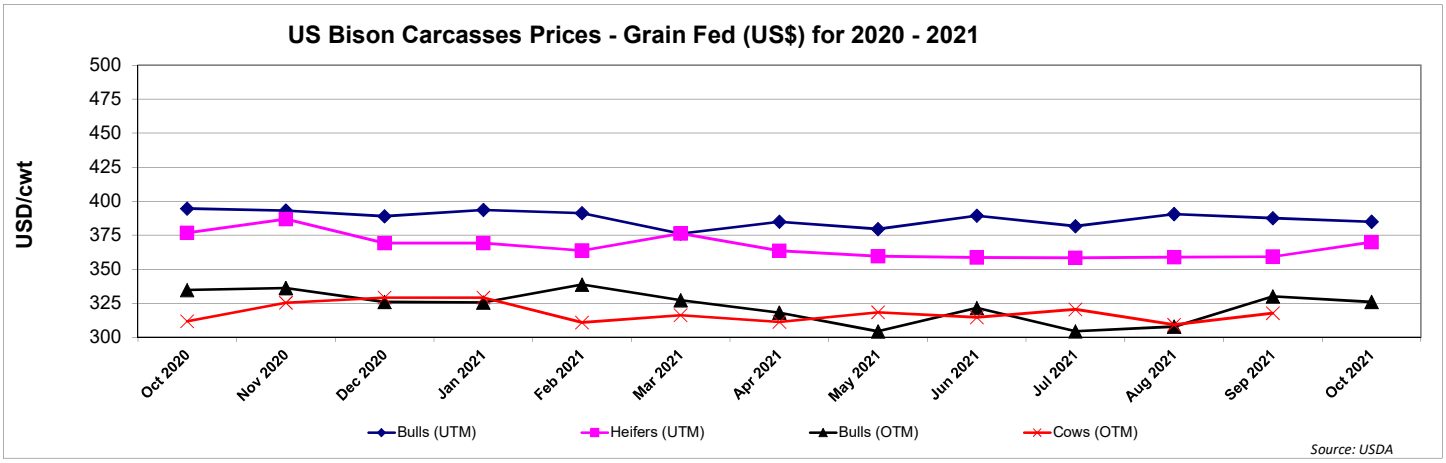


Chart 2



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