Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

# BISON MARKET AND SUPPLY UPDATE

***Prepared by Red Meat Section/Agriculture and Agri-Food Canada - June 27, 2022.***

## Weekly Federally Inspected Slaughter

| for week ending: | 7-May | 14-May | 21-May | 28-May | May Total | January - May YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|
| **Total Canada** | 115 | 210 | 214 | 55 | **594** | **3,179** | **2,973** | **6.9%** |
| ***previous year*** | 30 | 210 | 93 | 281 | **614** | | | |

## Provincially Inspected Slaughter

| | December 2021 | January 2022 | February 2022 | March 2022 | April 2022 | April 2021 | January - April YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **BC / Alberta** | 83 | 189 | 166 | 165 | 120 | 116 | 640 | 632 | 1.3% |
| **Sask / Manitoba** | 30 | 44 | 29 | 53 | 28 | 15 | 154 | 147 | 4.8% |
| **Ontario / Quebec** | 45 | 42 | 26 | 27 | 53 | 52 | 148 | 222 | -33.3% |
| **Canada Total** | **158** | **275** | **221** | **245** | **201** | **183** | **942** | **1,001** | **-5.9%** |

| | January - April YTD 2022 | 2021 | % Change |
|---|---|---|---|
| **Total Canadian Federal and Provincial Slaughter** | **3,527** | **3,360** | **5.0%** |

## Canadian Production

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | January - April YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **Total Slaughter** | 11,568 | 10,886 | 10,041 | 9,585 | 7,860 | 9,798 | 3,527 | 3,360 | **5.0%** |
| **Total Live Exports** | 18,364 | 17,600 | 17,342 | 20,060 | 24,574 | 27,986 | 12,344 | 9,579 | **28.9%** |
| **Total Production** | **29,932** | **28,486** | **27,383** | **29,645** | **32,434** | **37,784** | **15,871** | **12,939** | **22.7%** |

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

## US Federal Slaughter*

| for week ending: | 7-May | 14-May | 21-May | 28-May | May Total | January - May YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|
| | **1,361** | **1,383** | **1,456** | **1,438** | **5,638** | **29,275** | **26,659** | **9.8%** |
| ***previous year*** | 1,179 | 1,302 | 1,560 | 1,330 | **5,371** | | | |

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

## Canada Live Bison Exports to US

| | January 22 | February 22 | March 22 | April 22 | May 22 | January - May YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|
| Slaughter Male | 698 | 1,056 | 1,293 | 785 | 895 | 4,727 | 5,295 | **-10.7%** |
| Slaughter Female | 1,011 | 692 | 994 | 907 | 853 | 4,457 | 2,754 | **61.8%** |
| Feeder Male | 636 | 156 | 808 | 566 | 522 | 2,688 | 2,599 | **3.4%** |
| Feeder Female | 989 | 558 | 565 | 630 | 119 | 2,861 | 1,786 | **60.2%** |
| Total | **3,334** | **2,462** | **3,660** | **2,888** | **2,389** | **14,733** | **12,434** | **18.5%** |

**source : USDA, APHIS*

## Canadian Fresh or Chilled Bison Meat Exports

| ***Boneless*** | | Nov 2021 | Dec 2021 | Jan 2022 | Feb 2022 | Mar 2022 | Apr 2022 | January - April YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **United States** | Kg | 7,955 | 15,323 | 9,769 | 26,970 | 22,762 | 20,122 | **79,623** | **92,507** | **-13.9%** |
| | Value ($Cdn) | 135,255 | 277,857 | 138,429 | 226,368 | 364,257 | 216,463 | **945,517** | **1,097,062** | **-13.8%** |
| **Netherlands** | Kg | 7,857 | 3,821 | 753 | 7,204 | 2,597 | 7,276 | **17,830** | **645** | **-** |
| | Value ($Cdn) | 199,908 | 97,770 | 17,638 | 173,178 | 77,632 | 180,784 | **449,232** | **4,832** | **-** |
| **Switzerland** | Kg | 2,080 | 79 | 593 | 1,177 | 1,915 | 771 | **4,456** | **307** | **1351.5%** |
| | Value ($Cdn) | 85,041 | 2,472 | 18,837 | 56,825 | 63,762 | 24,115 | **163,539** | **9,886** | **1554.2%** |
| **Italy** | Kg | 933 | 1,164 | - | - | - | - | **-** | **495** | **-** |
| | Value ($Cdn) | 24,484 | 49,071 | - | - | - | - | **-** | **23,452** | **-** |
| **France** | Kg | - | - | - | - | - | - | **-** | **-** | **-** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **-** | **-** |
| **Germany** | Kg | - | - | - | - | - | - | **-** | **-** | **-** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **-** | **-** |
| **United Kingdom** | Kg | - | - | - | - | - | - | **-** | **-** | **-** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **-** | **-** |
| **Other Countries** | Kg | - | 709 | - | - | - | - | **-** | **-** | **-** |
| | Value ($Cdn) | - | 27,075 | - | - | - | - | **-** | **-** | **-** |
| **Total** | **Kg** | **18,825** | **21,096** | **11,115** | **35,351** | **27,274** | **28,169** | **101,909** | **93,954** | **8.5%** |
| | **Value ($Cdn)** | **444,688** | **454,245** | **174,904** | **456,371** | **505,651** | **421,362** | **1,558,288** | **1,135,232** | **37.3%** |

| ***Bone-in*** | | Nov 2021 | Dec 2021 | Jan 2022 | Feb 2022 | Mar 2022 | Apr 2022 | January - April YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total** | **Kg** | **434** | **1,267** | **-** | **103** | **5,775** | **25,378** | **31,256** | **50,498** | **-38.1%** |
| | **Value ($Cdn)** | **6,438** | **22,899** | **-** | **3,847** | **94,909** | **460,775** | **559,531** | **530,492** | **5.5%** |

| ***Total Exports, Boneless and Bone-in*** | Nov 2021 | Dec 2021 | Jan 2022 | Feb 2022 | Mar 2022 | Apr 2022 | January - April YTD 2022 | 2021 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **Kg** | **19,259** | **22,363** | **11,115** | **35,454** | **33,049** | **53,547** | **133,165** | **144,452** | **-7.8%** |
| **Value ($Cdn)** | **451,126** | **477,144** | **174,904** | **460,218** | **600,560** | **882,137** | **2,117,819** | **1,665,724** | **27.1%** |

**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) |
|---|---|---|---|---|
| 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 | |
| Nov 2021 | 384.61 | 362.80 | | 297.87 |
| Dec 2021 | 395.25 | 375.99 | 310.91 | 304.75 |
| Jan 2022 | 390.99 | 367.98 | | 285.82 |
| Feb 2022 | 378.85 | 367.18 | 309.85 | 281.59 |
| Mar 2022 | 392.76 | 373.39 | 332.14 | 309.63 |
| Apr 2022 | 389.18 | 370.04 | | 306.90 |
| May 2022 | 388.55 | 364.11 | | 337.33 |

**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 |
|---|---|---|---|---|---|---|---|
| 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 |
| Nov 2021 | 375-415 | 375-415 | 200-230 | 200-230 | Nov 2021 | 460-480 | 430-480 |
| Dec 2021 | 375-415 | 375-415 | 200-230 | 200-230 | Dec 2021 | 460-480 | 430-480 |
| Jan 2022 | 375-415 | 375-415 | 210-230 | 210-230 | Jan 2022 | 460-480 | 430-470 |
| Feb 2022 | 375-415 | 360-415 | 200-230 | 200-230 | Feb 2022 | 460-480 | 440-470 |
| Mar 2022 | 375-415 | 360-415 | 200-230 | 190-230 | Mar 2022 | 460-480 | 440-470 |
| Apr 2022 | 375-415 | 365-415 | 200-230 | 185-230 | Apr 2022 | 460-480 | 440-470 |
| May 2022 | 375-425 | 365-425 | 200-230 | 185-230 | May 2022 | 460-480 | 440-470 |
| Jun 2022 | 375-425 | 365-425 | 200-230 | 185-230 | Jun 2022 | 460-480 | 440-470 |

**source CBA survey of marketers*

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

| | March 2022 | | April 2022 | | May 2022 | | % Change Current Month vs. 2 mnths prior | % Change Current Month vs. 1 month prior |
|---|---|---|---|---|---|---|---|---|
| | Range | Wt. Avg | Range | Wt. Avg | Range | Wt. Avg | | |
| Ribeye Lip-On Fresh | 1,335 - 1,552 | 1,444.45 | 1,314 - 1,543 | 1,434.81 | 1,323 - 1,575 | 1,497.20 | 3.7% | 4.3% |
| Chuckroll/Clod Fresh | 667 - 683 | 672.61 | 665 - 681 | 672.12 | 651 - 662 | 658.98 | -2.0% | -2.0% |
| Striploin Fresh | 835 - 1,245 | 994.48 | 1,112 - 1,216 | 1,147.03 | 1,091 - 1,208 | 1,149.87 | 15.6% | 0.2% |
| Tenderloin Fresh | 1,804 - 2,409 | 1,943.15 | 1,795 - 2,448 | 1,952.71 | 1,812 - 2,511 | 1,996.38 | 2.7% | 2.2% |
| Grnd 85% Bulk, Frozen | 717 - 750 | 720.35 | 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 | N/A | N/A | 712 - 770 | 740.37 | 727 - 734 | 729.02 | N/A | -1.5% |

**source USDA*

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

| | Mid-March 2022 Pricing | Mid-April 2022 Pricing | Mid-May 2022 Pricing | Mid-June 2022 Pricing |
|---|---|---|---|---|
| Tenderloin - Fresh | $39.95 - $52.00 | $39.95 - $43.95 | $39.95 - $43.95 | $39.95 - $43.95 |
| Strip Loin Boneless - Fresh | $25.00 - $32.00 | $25.00 - $32.00 | $25.00 - $32.00 | $25.00 - $32.00 |
| Inside Round - Fresh | $17.95 - $19.00 | $17.95 - $19.00 | $17.95 - $19.00 | $17.95 - $19.00 |
| Ground 90% Bulk Fresh | $15.95 - $17.75 | $14.95 - $17.75 | $14.95 - $17.75 | $14.95 - $17.75 |
| Fresh Bison Trim | $11.95 - $12.00 | $11.95 - $12.00 | $11.95 - $12.00 | $11.95 - $12.00 |

**source CBA survey of marketers*

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

**Jack Auction Group (SK) - June 23, 2022**
Video Bison Sale

| Age / Sex | Quantity | Quality / Type | Price/lb |
|---|---|---|---|
| 2020 Bulls | 35 | G-Ex Plains | $2.22 |
| 2020 Bulls | 19 | M-Ex Cross | $1.81 |
| 2020 Heifers | 29 | M-Ex Cross | $1.55 |
| 2021 Bulls | 10 | G-Ex Cross | $1.84 |
| 2020 Mixed | 51 | G-Ex Cross | $1.51 |
| 2020 Heifers | 8 | M-Ex Cross | $1.06 |
| 2021 Heifers | 13 | M-Ex Cross | $1.65 |

Ex – Excellent M – Medium G- Good P – Poor Exp – Exposed

**Jack Auction Group (SK) - May 26, 2022**
Video Bison Sale

| Age / Sex | Quantity | Quality / Type | Price/lb |
|---|---|---|---|
| 2020 Bulls | 38 | G-Ex Wood X | $1.84 |
| 2020 Bulls | 25 | G-Ex Wood X | $1.92 |
| 2020 Heifers | 35 | G-Ex Wood X | $1.49 |
| 2020 Heifers | 50 | M-Ex Wood X | $1.43 |
| 2021 Mixed | 95 | G-Ex Wood X | $1.50 |
| 2021 Mixed | 15 | M-Ex Wood X | $1.10 |
| 2021 Mixed | 95 | G-Ex Plains | $1.50 |
| 2021 Mixed | 36 | M-Ex Plains | $1.10 |
| 2021 Bulls | 39 | G-Ex Wood X | $1.76 |
| 2021 Heifers | 29 | G-Ex Wood X | $1.25 |
| 2021 Bulls | 14 | G-Ex Plains | $1.66 |
| 2021 Heifers | 1412 | G-Ex Plains | $1.60 |
| 2021 Mixed | 42 | G-Ex Wood X | $1.46 |
| 2021 Mixed | 17 | G-Ex Wood X | $1.51 |
| 2021 Mixed | 16 | G-Ex Wood X | $1.40 |
| 2021 Mixed | 18 | M-Ex Wood X | $1.61 |
| 2021 Mixed | 9 | G-Ex Wood X | $1.40 |
| 2021 Mixed | 17 | M-Ex Wood X | $1.10 |
| 2020 Bulls | 12 | M-Ex Wood X | Passed |
| 2020 Mixed | 11 | M-Ex Wood X | $1.31 |
| 2020 Brdng Bull | 1 | Ex Plains | $4,100/head |

Ex – Excellent M – Medium G- Good P – Poor Exp – Exposed

**Ritchie Bros. Auctioneers (SK) (May 4, 2022)**
***Head Sold: 377*** **ack to the Grass Bison Auction**

| Class | # of head | Average/lb |
|---|---|---|
| **2021 BULLS** | | |
| 600 - 700 lbs. | 21 | $1.69 |
| 500 - 599 lbs. | 88 | $1.56 |
| 400 - 499 lbs. | 36 | $1.39 |
| 300 - 399 lbs. | 5 | $1.00 |
| **2020 BULLS** | | |
| Over 1000 lbs | 2 | $2.22 |
| Over 900 lbs | 1 | $1.20 |
| 800 - 899 lbs. | 2 | $1.38 |
| 700 - 799 lbs. | 1 | $1.35 |
| 600 - 699 lbs. | 2 | $1.30 |
| 400 - 499 lbs. | 1 | $1.25 |
| **2019 BULLS** | | |
| Over 1600 lbs | 1 | $4.56 |
| 1100 - 1199 lbs | 2 | $1.67 |
| **2018 BULLS** | | |
| Over 1500 lbs | 1 | $0.38 |
| **2021 HEIFERS** | | |
| 600 - 699 lbs | 12 | $0.83 |
| 500 - 599 lbs. | 78 | $0.73 |
| 400 - 499 lbs. | 104 | $0.59 |
| 250 - 399 lbs. | 20 | $0.27 |

**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 diane.blandford@agr.gc.ca

Finished bison prices for slaughter in Canada showed some upward movement with Canadian buyers paying $4.25 - $4.40/lb HHW for finished prime bulls. Heifers were selling at $4.25/lb HHW. 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 CAD $4.80/lb HHW. 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.

Slaughter numbers at federally-inspected plants in Canada for the first 25 weeks of 2022 (week ending June 25, 2022) totaled 3,742 head, which is up 1.7% compared to the bison slaughtered in 2021 during the same period (3,679 head) and 21.0% above the 3,092 slaughtered in 2020 (same time period). According to USDA data, during the first five months of 2022, 29,275 bison were slaughtered in the US – 9.8% above the 26,659 slaughtered for the same period in 2021.

U.S. buyers are offering up to USD $4.00/lb HHW for prime bulls and up to USD $3.80/lb 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 U.S. to the end of May 2022 at 14,733 head are 18.5% above the 12,434 bison exported to the U.S from January-May 2021.

Marketers report steady demand for most cuts with some buildup of trim.

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. Demand in Canada is expected to increase with the marketing initiatives of bison marketers, as well as increased bison awareness and sales by farm direct marketers.

**Chart 1**

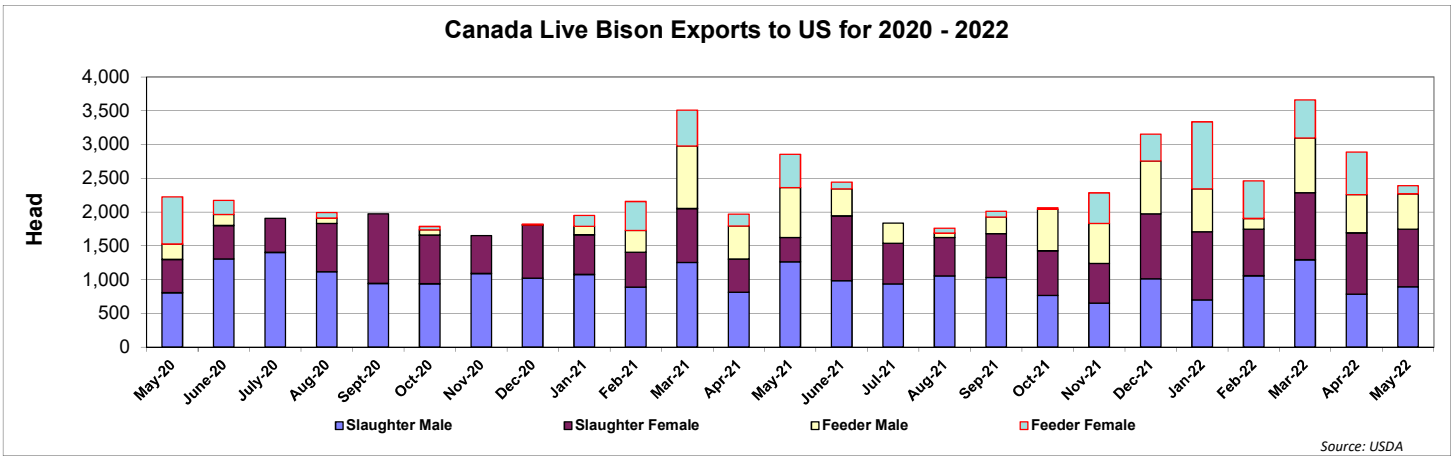
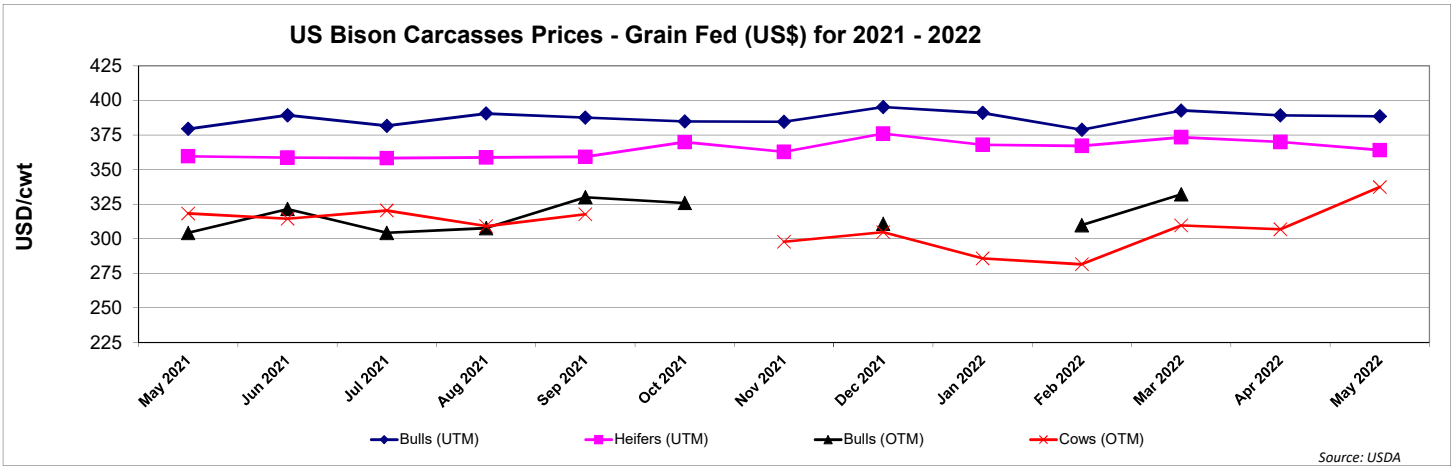



**Chart 2**




***NEW* The Canadian Bison Industry by the Numbers…..**

On another note, the 2021 Canadian Census of Agriculture data was released on May 11, 2022. Nationally, the number of bison farms and ranches reporting bison was up 1.4% from 2016 levels. The number of bison on farms and ranches in 2021 was reported to have increased by over 25% within the past five years. According to the data, the average bison herd size increased to 151 head (from 122 head in 2016).

The number of farms and ranches held relatively steady since 2016 (up by 14 farms); some provinces reported increases (Ontario and Alberta both up by 6.1%) and some reported declines (Quebec down by 23.5% and British Columbia down 12.7%)

Excluding the Atlantic Region, the only province to report a decrease in the number of bison was Manitoba (-16.4%), while British Columbia reported the most significant increase (+128.9%); more than doubling the 2016 provincial herd size.

| | FARMS REPORTING BISON | | | | | NUMBER OF BISON REPORTED | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2021 | 2016 | 2011 | 2006 | %Chg '21 vs '16 | 2021 | 2016 | 2011 | 2006 | %Chg '21 vs '16 |
| Nfld and Labrador | 0 | 0 | 0 | 0 | - | 0 | 0 | 0 | 0 | - |
| Prince Edward Island | 0 | 0 | 0 | 1 | - | 0 | 0 | 0 | * | - |
| Nova Scotia | 1 | 2 | 2 | 1 | -50.0% | * | * | * | * | - |
| New Brunswick | 0 | 1 | 2 | 3 | -100.0% | 0 | * | * | * | - |
| Quebec | 26 | 34 | 45 | 69 | -23.5% | 1,682 | 1,538 | 2,380 | 4,322 | 9.4% |
| Ontario | 52 | 49 | 60 | 71 | 6.1% | 2,974 | 1,843 | 2,320 | 4,106 | 61.4% |
| Manitoba | 82 | 86 | 108 | 166 | -4.7% | 11,725 | 14,025 | 14,116 | 19,609 | -16.4% |
| Saskatchewan | 308 | 303 | 352 | 597 | 1.7% | 52,860 | 40,418 | 39,343 | 57,395 | 30.8% |
| Alberta | 472 | 445 | 571 | 869 | 6.1% | 65,405 | 54,907 | 57,483 | 97,366 | 19.1% |
| British Columbia | 48 | 55 | 71 | 121 | -12.7% | 14,888 | 6,504 | 9,206 | 12,656 | 128.9% |
| **Canada Total** | **989** | **975** | **1,211** | **1,898** | **1.4%** | **149,539** | **119,314** | **125,142** | **195,728** | **25.3%** |

* Note: In Atlantic Provinces, the number of farms reporting is too small to publically disclosure the number of bison