



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - July 28, 2017.

### Weekly Federal Bison Slaughter

|               | 03-Jun | 10-Jun | 17-Jun   | 24-Jun | 01-Jul | June Total | January - June YTD |       |       |
|---------------|--------|--------|----------|--------|--------|------------|--------------------|-------|-------|
|               | 2017   | 2016   | % Change |        |        |            |                    |       |       |
| Total Canada  | 143    | 258    | 88       | 275    | 44     | 808        | 4,908              | 4,933 | -0.5% |
| previous year | 102    | 175    | 197      | 295    | 78     | 847        |                    |       |       |

### Provincially Inspected Slaughter

|                  | Jan 2017 | Feb 2017 | Mar 2017 | Apr 2017 | May 2017 | May 2016 | January - May YTD |     |        |
|------------------|----------|----------|----------|----------|----------|----------|-------------------|-----|--------|
|                  | 2017     | 2016     | % Change |          |          |          |                   |     |        |
| Alberta          | 63       | 45       | 70       | 44       | 57       | 110      | 279               | 445 | -37.3% |
| Saskatchewan     | 8        | 2        | 1        | 13       | 8        | 13       | 32                | 49  | -34.7% |
| Manitoba/BC      | 52       | 34       | 40       | 31       | 45       | 21       | 202               | 169 | 19.5%  |
| Ontario/Quebec** | 28       | 21       | 16       | 21       | 39       | 29       | 125               | 66  | 89.4%  |
| Total            | 151      | 102      | 127      | 109      | 149      | 173      | 638               | 729 | -12.5% |

|                                                   | YTD 2017 | YTD 2016 | % Change |
|---------------------------------------------------|----------|----------|----------|
| Total Canadian Federal and Provincial Slaughter * | 5,546    | 5,662    | -2.0%    |

\*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

|                    | 2011   | 2012   | 2013     | 2014   | 2015   | 2016   | January - May YTD |        |        |
|--------------------|--------|--------|----------|--------|--------|--------|-------------------|--------|--------|
|                    | 2017   | 2016   | % Change |        |        |        |                   |        |        |
| Total Slaughter    | 13,048 | 13,587 | 14,388   | 14,371 | 14,186 | 11,568 | 4,738             | 4,815  | -1.6%  |
| Total Live Exports | 14,465 | 14,007 | 16,769   | 19,033 | 26,162 | 18,364 | 8,138             | 10,191 | -20.1% |
| Total Production   | 27,513 | 27,594 | 31,157   | 33,404 | 40,348 | 29,932 | 12,876            | 15,006 | -14.2% |

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

### US Federal Slaughter\*

|                  | 03-Jun | 10-Jun | 17-Jun   | 24-Jun | 01-Jul | June Total | January - June YTD |        |       |
|------------------|--------|--------|----------|--------|--------|------------|--------------------|--------|-------|
|                  | 2017   | 2016   | % Change |        |        |            |                    |        |       |
| for week ending: | 965    | 1,133  | 1,206    | 1,116  | 1,209  | 5,629      | 27,021             | 27,795 | -2.8% |
| previous year    | 851    | 1,201  | 1,006    | 1,113  | 1,096  | 5,267      |                    |        |       |

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

### Canada Live Bison Exports to US

|                  | February-17 | March-17 | April-17 | May-17 | June-17 | 2017  | 2016   | % Change |
|------------------|-------------|----------|----------|--------|---------|-------|--------|----------|
| Slaughter Male   | 579         | 728      | 675      | 464    | 1027    | 3,895 | 3,788  | 2.8%     |
| Slaughter Female | 432         | 266      | 301      | 648    | 381     | 2,409 | 2,882  | -16.4%   |
| Feeder Male      | 893         | 373      | 391      | 574    | 0       | 2,242 | 3,220  | -30.4%   |
| Feeder Female    | 278         | 325      | 104      | 289    | 90      | 1,090 | 1,882  | -42.1%   |
| Total            | 2,182       | 1,692    | 1,471    | 1,975  | 1,498   | 9,636 | 11,772 | -18.1%   |

\*source : USDA, APHIS

### Canadian Fresh or Chilled Bison Meat Exports

|                       |               | December 2016 | January 2017 | February | March     | April     | May     | January - May YTD |           |         |
|-----------------------|---------------|---------------|--------------|----------|-----------|-----------|---------|-------------------|-----------|---------|
|                       |               | 2017          | 2016         | % Change |           |           |         |                   |           |         |
| Boneless              | Kg            | 57,296        | 25,118       | 82,375   | 49,952    | 40,529    | 25,602  | 223,576           | 223,160   | 0.2%    |
|                       | Value (\$Cdn) | 1,141,408     | 457,911      | 720,019  | 980,362   | 914,879   | 614,941 | 3,688,112         | 3,564,846 | 3.5%    |
| France                | Kg            | 4,136         | 3,649        | 3,256    | 4,058     | 4,731     | 2,474   | 18,168            | 16,140    | 12.6%   |
|                       | Value (\$Cdn) | 95,222        | 76,215       | 72,577   | 84,402    | 95,702    | 55,947  | 384,843           | 296,085   | 30.0%   |
| Switzerland           | Kg            | 11,486        | 3,788        | 3,358    | 6,019     | 8,126     | 712     | 22,003            | 19,621    | 12.1%   |
|                       | Value (\$Cdn) | 360,878       | 102,456      | 91,769   | 183,707   | 304,846   | 24,246  | 707,024           | 764,356   | -7.5%   |
| Netherlands           | Kg            | -             | 3,191        | 410      | 461       | -         | 271     | 4,333             | 278       | 1458.6% |
|                       | Value (\$Cdn) | -             | 43,558       | 19,947   | 20,268    | -         | 12,252  | 96,025            | 10,449    | 819.0%  |
| Germany               | Kg            | -             | -            | -        | -         | -         | -       | -                 | -         | N/A     |
|                       | Value (\$Cdn) | -             | -            | -        | -         | -         | -       | -                 | -         | N/A     |
| French Southern Terr. | Kg            | -             | -            | -        | -         | -         | -       | -                 | -         | N/A     |
|                       | Value (\$Cdn) | -             | -            | -        | -         | -         | -       | -                 | -         | N/A     |
| Belgium               | Kg            | -             | -            | -        | -         | -         | -       | -                 | -         | N/A     |
|                       | Value (\$Cdn) | -             | -            | -        | -         | -         | -       | -                 | -         | N/A     |
| Other Countries       | Kg            | -             | -            | -        | -         | -         | -       | -                 | 132       | N/A     |
|                       | Value (\$Cdn) | -             | -            | -        | -         | -         | -       | -                 | 5,471     | N/A     |
| Total                 | Kg            | 72,918        | 35,746       | 89,399   | 60,490    | 53,386    | 29,059  | 268,080           | 259,331   | 3.4%    |
|                       | Value (\$Cdn) | 1,597,508     | 680,140      | 904,312  | 1,268,739 | 1,315,427 | 707,386 | 4,876,004         | 4,641,207 | 5.1%    |

### Bone-in

|       |               | December 2016 | January 2017 | February | March  | April  | May    | January - May YTD |         |        |
|-------|---------------|---------------|--------------|----------|--------|--------|--------|-------------------|---------|--------|
|       |               | 2017          | 2016         | % Change |        |        |        |                   |         |        |
| Total | Kg            | 6,688         | 49,316       | 21,464   | 1,779  | 771    | 863    | 74,193            | 21,248  | 249.2% |
|       | Value (\$Cdn) | 32,351        | 562,377      | 99,807   | 28,899 | 15,632 | 13,808 | 720,523           | 189,871 | 279.5% |

### Total Exports, Boneless and Bone-in

|                                     |               | December 2016 | January 2017 | February  | March     | April     | May     | January - May YTD |           |       |
|-------------------------------------|---------------|---------------|--------------|-----------|-----------|-----------|---------|-------------------|-----------|-------|
|                                     |               | 2017          | 2016         | % Change  |           |           |         |                   |           |       |
| Total Exports, Boneless and Bone-in | Kg            | 79,606        | 85,062       | 110,863   | 62,269    | 54,157    | 29,922  | 342,273           | 280,579   | 22.0% |
|                                     | Value (\$Cdn) | 1,629,859     | 1,242,517    | 1,004,119 | 1,297,638 | 1,331,059 | 721,194 | 5,596,527         | 4,831,078 | 15.8% |

\*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) |
|-----------|-------------|---------------|-------------|------------|
| June 2016 | 446.39      | 431.28        | 384.95      | 372.72     |
| July 2016 | 456.73      | 443.64        | 396.95      | 383.75     |
| Aug 2016  | 458.44      | 479.02        | 398.13      | 381.79     |
| Sept 2016 | 465.07      | 466.27        | 400.36      | 389.53     |
| Oct 2016  | 473.32      | 484.46        | 436.29      | 393.95     |
| Nov 2016  | 468.92      | 453.88        | 413.78      | 397.58     |
| Dec 2016  | 482.14      | 475.42        | 413.10      | 405.75     |
| Jan 2017  | 485.96      | 452.06        | 410.89      | 405.38     |
| Feb 2017  | 489.58      | 466.48        | 419.09      | 444.59     |
| Mar 2017  | 488.07      | 468.30        | 413.91      | 399.43     |
| Apr 2017  | 488.74      | 473.03        | 411.61      | 397.55     |
| May 2017  | 482.64      | 477.37        | 410.77      | 399.21     |
| June 2017 | 483.34      | 472.84        | 410.26      | 401.69     |

\*source USDA

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

wghtd avg

|           | Bulls   | Heifers | Mature Bulls | Mature Cows |
|-----------|---------|---------|--------------|-------------|
| July 2016 | 600-610 | 565-575 | 500          | 500         |
| Aug 2016  | 600-610 | 565-575 | 500          | 500         |
| Sept 2016 | 600-625 | 575-600 | 500-525      | 500-525     |
| Oct 2016  | 600-625 | 575-600 | 500-550      | 500-525     |
| Nov 2016  | 600-625 | 575-600 | 500-515      | 500-515     |
| Dec 2016  | 600-625 | 575-600 | 500-515      | 500-510     |
| Jan 2017  | 600-650 | 575-600 | 500-515      | 500-510     |
| Feb 2017  | 600-650 | 575-600 | 500-515      | 500-510     |
| Mar 2017  | 625-650 | 600-630 | 500-515      | 500-510     |
| Apr 2017  | 625-650 | 600-630 | 525-550      | 525-550     |
| May 2017  | 625-650 | 600-630 | 525-550      | 525-550     |
| June 2017 | 625-650 | 600-630 | 525-550      | 525-550     |
| July 2017 | 625-650 | 600-630 | 525-550      | 525-550     |

\*source CBA survey of marketers

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

|                            | April 2017  |          | May 2017    |          | June 2017   |          | % Change Current Month vs. |               |
|----------------------------|-------------|----------|-------------|----------|-------------|----------|----------------------------|---------------|
|                            | Range       | Wt. Avg  | Range       | Wt. Avg  | Range       | Wt. Avg  | 2 months prior             | 1 month prior |
| Ribeye Lip-On Fresh        | 1,390-1,877 | 1,547.83 | 1,390-1,877 | 1,549.96 | 1,390-1,780 | 1,486.09 | -4.0%                      | -4.1%         |
| Chuckroll/Clod Fresh       | 620-890     | 714.00   | 620-870     | 706.68   | 620-860     | 734.03   | 2.8%                       | 3.9%          |
| Striploin Fresh            | 1,095-1,650 | 1,408.94 | 920-1,650   | 1,346.17 | 928-1,650   | 1,373.21 | -2.5%                      | 2.0%          |
| Tenderloin Fresh           | 1,430-2,658 | 2,121.71 | 1,300-2,620 | 2,100.51 | 1,700-2,620 | 2,014.32 | -5.1%                      | -4.1%         |
| Ground 90% Bulk, Fresh     | 600-750     | 627.00   | 600-750     | 627.00   | 600-800     | 778.04   | 24.1%                      | 24.1%         |
| Ground 85% Bulk, Frozen    | 700-1,021   | 773.33   | 719-1,048   | 772.69   | 700-1,027   | 782.21   | 1.1%                       | 1.2%          |
| Ground 85% Patties, Frozen | 650-919     | 782.27   | 399-921     | 778.15   | 650-1,256   | 777.47   | -0.6%                      | -0.1%         |

\*source USDA

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

|                             | Mid-April 2017 Pricing | Mid-May 2017 Pricing | Mid-June 2017 Pricing | Mid-July 2017 Pricing |
|-----------------------------|------------------------|----------------------|-----------------------|-----------------------|
| Tenderloin - Fresh          | \$40.95 - \$60.00      | \$40.95 - \$60.00    | \$40.95 - \$60.00     | \$40.95 - \$60.00     |
| Strip Loin Boneless - Fresh | \$36.00 - \$38.00      | \$36.00 - \$38.00    | \$36.00 - \$38.00     | \$36.00 - \$38.00     |
| Inside Round - Fresh        | \$20.95 - \$25.00      | \$20.95 - \$25.00    | \$20.95 - \$25.00     | \$21.95 - \$25.00     |
| Ground 90% Bulk Fresh       | \$20.95 - \$23.93      | \$20.95 - \$23.93    | \$20.95 - \$23.93     | \$20.95 - \$23.93     |
| Fresh Bison Trim            | \$19.95 - \$21.50      | \$19.95 - \$21.50    | \$19.95 - \$21.50     | \$19.95 - \$22.25     |

\*source CBA survey of marketers

**Live Auction Reports** \*most recent reported, may not reflect current market

| Kramer Auction Sales (SK) (May 10, 2017) 501 head |           |             | Vold, Jones & Vold Auction Co. Ltd. (AB) (March 18, 2017)<br>Head Sold: 579 |                         |                     | Kramer Auction Sales (SK) (Mar 8, '17) 571 head |            |             |
|---------------------------------------------------|-----------|-------------|-----------------------------------------------------------------------------|-------------------------|---------------------|-------------------------------------------------|------------|-------------|
| CLASS (# of head)                                 | # of head | Avg (\$/lb) |                                                                             |                         |                     | CLASS                                           | # of head  | Avg (\$/lb) |
| <b>2016 BULLS</b>                                 |           |             | <b>2016 BULLS</b>                                                           |                         |                     | <b>2016 BULLS</b>                               |            |             |
| 600 and Over                                      | 29        | \$4.05      | <b>Calves</b>                                                               | <b>Bulls</b>            | <b>Heifers</b>      | 551-600 lbs                                     | 10         | \$5.42      |
| 551-600lbs                                        | 81        | \$5.49      | 500 lbs +                                                                   | \$440.00 - \$520.00     | \$320.00 - \$370.00 | 501-550 lbs                                     | 76         | \$5.90      |
| 501-550lbs                                        | 68        | \$5.41      | 400 - 499 lbs                                                               | \$420.00 - \$560.00     | \$440.00 - \$510.00 | 451-500 lbs                                     | 69         | \$6.21      |
| 451-500lbs                                        | 49        | \$5.55      | 300 - 399 lbs                                                               | \$520.00 - \$620.00     | \$440.00 - \$530.00 | 401-450 lbs                                     | 72         | \$6.62      |
| 401-450lbs                                        | 42        | \$5.21      | Under 300 lbs                                                               | \$550.00 - \$660.00     | \$470.00 - \$570.00 | 351-400 lbs                                     | 31         | \$6.51      |
| 351-400lbs                                        | 12        | \$4.94      | <b>Yearlings</b>                                                            | <b>Bulls</b>            | <b>Heifers</b>      | Under 350 lbs                                   | 19         | \$5.91      |
| Under 350                                         | 13        | \$5.15      | 700 - 799 lbs                                                               | \$320.00 - \$370.00     |                     | <b>2015 YEARLING BULLS</b>                      |            |             |
| Off Types                                         | 4         | \$4.08      | 600 - 699 lbs                                                               | \$350.00 - \$390.00     | \$320.00 - \$370.00 | 751-801 lbs                                     | 2          | \$4.43      |
| <b>2015 BREEDING BULLS</b>                        |           |             | 500 - 599 lbs                                                               | \$360.00 - \$440.00     | \$300.00 - \$350.00 | 701-750 lbs                                     | 9          | \$4.01      |
| Over 1201                                         | 5         | \$4.91      | 400 - 499 lbs                                                               | \$420.00 - \$500.00     | \$270.00 - \$330.00 | 651-700 lbs                                     | 4          | \$3.73      |
| 1101-1200 lbs                                     | 1         | \$3.57      | <b>Mature Bulls</b>                                                         |                         |                     | Under 600 lbs                                   | 8          | \$3.80      |
| 1000-1100 lbs                                     | 1         | \$4.36      | 1250 lbs +                                                                  | \$280.00 - \$310.00     |                     | <b>2014 BULLS</b>                               |            |             |
| <b>2015 BULLS</b>                                 |           |             | 950 - 1249 lbs                                                              | \$290.00 - \$330.00     |                     | 950-1000 lbs                                    | 3          | \$3.40      |
| 751-800 lbs                                       | 1         | \$3.50      | <b>Mature Cows</b>                                                          |                         |                     | Under 950 lbs                                   | 1          | \$3.50      |
| 701-750 lbs                                       | 3         | \$3.60      | 950 lbs +                                                                   | \$290.00 - \$310.00     |                     | <b>2016 HEIFERS</b>                             |            |             |
| 601-700lbs                                        | 6         | \$3.38      | 700 - 949 lbs                                                               | \$270.00 - \$300.00     |                     | 501-Over                                        | 54         | \$5.54      |
| Under 600                                         | 5         | \$3.44      | Younger Breds                                                               | \$2,600.00 - \$2,900.00 |                     | 451-500lbs                                      | 26         | \$6.31      |
| <b>2014 BULLS</b>                                 |           |             | Older Bred                                                                  | \$2,100.00 - \$2,500.00 |                     | 401-450lbs                                      | 75         | \$4.42      |
| 600 - 650 lbs                                     | 3         | \$3.70      | <b>2015 HEIFERS</b>                                                         |                         |                     | 351-400lbs                                      | 42         | \$3.91      |
| <b>2016 HEIFER CALVES</b>                         |           |             | <b>2015 HEIFERS</b>                                                         | <b># of head</b>        | <b>Avg (\$/lb)</b>  | Under 350 lbs                                   | 13         | \$4.45      |
| 600-700lbs                                        | 2         | \$5.50      | 651-700 lbs                                                                 | 10                      | \$4.10              | <b>2015 HEIFERS</b>                             |            |             |
| 501-599lbs                                        | 23        | \$5.42      | 601-650 lbs                                                                 | 4                       | \$4.28              | 800-over                                        | 10         | \$4.51      |
| 451-500lbs                                        | 31        | \$5.08      | 551-600 lbs                                                                 | 6                       | \$4.12              | 751-799lbs                                      | 5          | \$3.26      |
| 401-450lbs                                        | 45        | \$5.16      | Under 550                                                                   | 3                       | \$3.93              | 701-750lbs                                      | 7          | \$3.86      |
| 351-400lbs                                        | 25        | \$4.48      |                                                                             |                         |                     | 651-700lbs                                      | 5          | \$3.58      |
| Under 350                                         | 23        | \$4.73      |                                                                             |                         |                     | 601-650lbs                                      | 18         | \$3.67      |
| Off Types                                         | 6         | \$3.72      |                                                                             |                         |                     | Under 600                                       | 11         | \$3.19      |
|                                                   |           |             |                                                                             |                         |                     | <b>CULL LOW</b>                                 | 1 (760lbs) | \$1.25      |

## 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 [cba2@sasktel.net](mailto:cba2@sasktel.net) or [diane.blandford@agr.gc.ca](mailto:diane.blandford@agr.gc.ca)

Prices offered to producers in mid-July were stable with prices as high as \$6.50 per pound HHW for Grade "A" bulls. U.S. buyers are offering prices that equate to \$6.50 Canadian with returns dependent on quality, transport incentives, and export costs. Canadian buyers are paying up to \$6.30 per pound HHW for Grade "A" heifers. U.S. buyers are offering prices that equate to Canadian prices with returns dependent on quality, transport incentives, and export costs.

Nationally, federal slaughter in Canada for the first 26 weeks of 2017 (week ending July 1, 2017) was down marginally (-0.5%) when compared to the same period in 2016 (4,908 animals in 2017 compared to 4,933 animals in 2016). Live animal exports to the US in the first six months of 2017 were at 9,636 head, 18.1% below the 11,772 head exported the six months of 2016.

Marketers report that strong demand for bison trim continues. The demand for middle cuts has been steady with little build-up of inventory reported. US demand continues to be steady. There is a steady demand for bison in Europe, with continued interest building as the Comprehensive Economic Trade Agreement with the European Union goes into effect on September 21, 2017.

Canadian demand is steady. The Canadian marketers indicate that present supplies of finished bison continue to be very tight.

Bison prices in Canada are expected to continue to be sensitive to Canada - US exchange rates with price changes expected as the Canadian dollar strengthens.

Chart 1

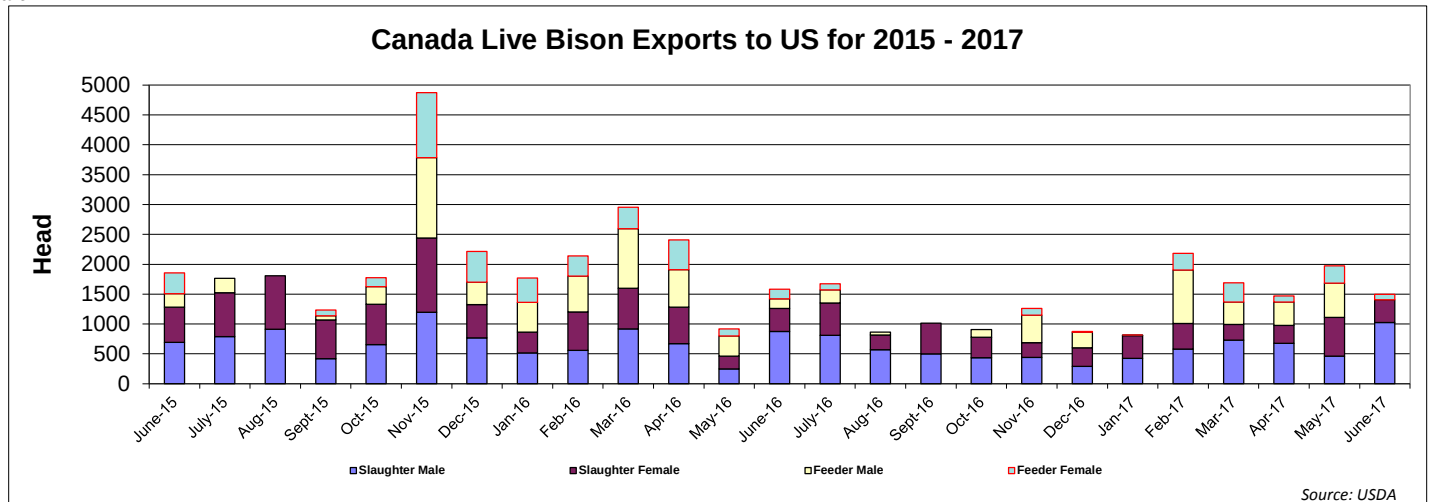
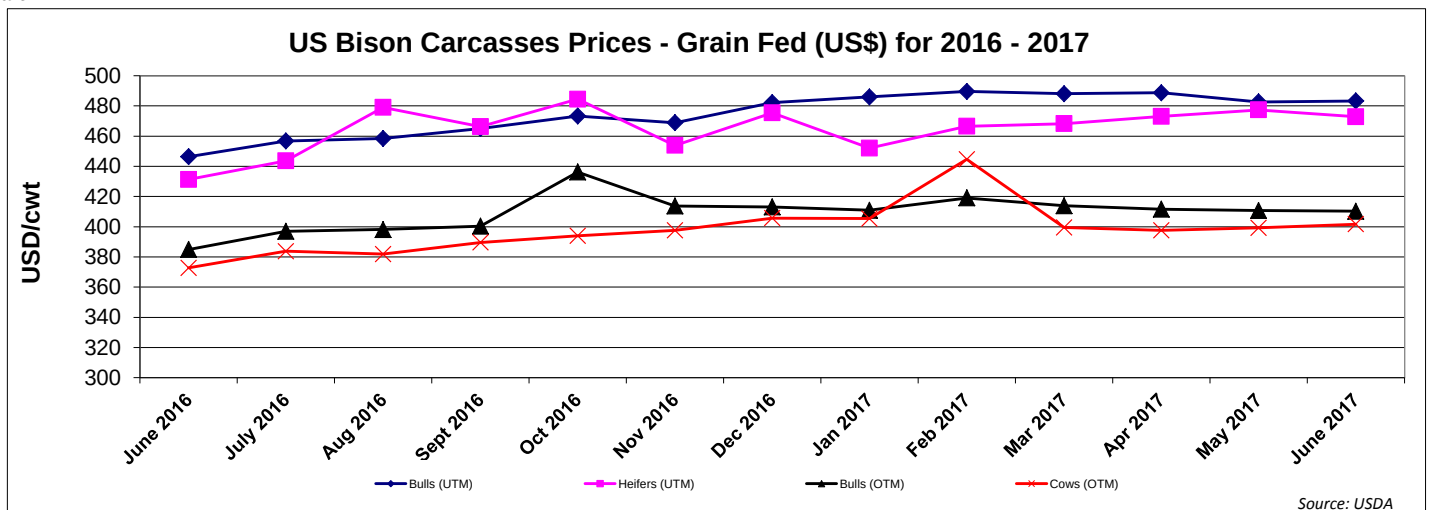


Chart 2



## 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