

# Bison Meat Market in the European Union



August 28, 2023



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# BISON MARKET IN THE EUROPEAN UNION

## Background

The bison industry is a relatively small industry in Manitoba and Canada. The number of bison in Manitoba has increased by 154 per cent since the first bison census in 1996. Over the years, the bison industry has benefited from strong pricing and high demand for its meat product. Because of its unique production system and product quality attributes, bison meat is a niche product. The industry is export-driven mainly to the U.S. market. The current focus on sustainability and a healthy diet among a growing number of consumers is fueling the growth in the bison industry.

Bison were once the most dominant animals roaming the grassland of the North American Great Plains. Before 1868, the bison population was estimated to range between 30 and 70 million.<sup>1</sup> Although bison numbers dropped to a near extinction level, just over 1,000 by 1890, it has since recovered to reach nearly 360,000<sup>2</sup> today, thanks to increased public and private conservation efforts. The reintroduction of bison to the Great Plains is considered one of the most successful conservation efforts in North America. In Europe, bison has been reintroduced thanks to conservationists, but numbers remain very low. Currently, the American species has far higher numbers and perspective is shifting away from solely conservation towards utilization as a food resource.<sup>3</sup>

Despite data gaps in this sector and challenges with the use of Harmonized System (HS) tariff codes among different countries<sup>4</sup> that trade bison products, this report provides insights on Canada's bison exports and highlights opportunities for Canada in the European Union (EU) market.

## Bison by the Numbers

In Europe, the bison (*Bison bonasus*) population is estimated at 10,000,<sup>5</sup> half of which live in Central Europe. The animals were reintroduced into the wild in Bialowieza Forest (Poland) back in 1929, and this park currently hosts 500 animals. In addition, there are 1,400 bison in Bieszczady Mountains, in Masuria and in West Pomerania (Poland). These numbers are promising, but not guarantee the preservation of the species. Given the very small bison population in Europe, the EU market relies on bison meat imports from North America to fulfill their demand.

In North America, the population of American Bison (360,000) is located in Canada and the US. The Canadian herd size is 149,539, with Manitoba having 11,725 heads<sup>6</sup>. The remaining 210,000 heads are in the US with 171,100 heads residing on 1,775 private ranches and farms, 9,900 in US federal herds, 9,000 in state and other public herds and 20,000 on tribal lands. In 2020, approximately 69,000 bison were harvested in the US and Canada, representing only 0.15 per cent of the total bovine animals slaughtered. Eighty-five per cent of the bison in North America were slaughtered under federally inspected facilities, with the remaining heads at state-inspected facilities.

Manitoba reported 4,621 bison during the first census in 1996, 10.2 per cent of the Canadian bison population at the time. Between 1996 and 2021, the number of bison in Manitoba increased by 154 per cent overall. However, there was a decrease in the bison population after the 2006 census, both in Manitoba and Canada as shown in Figure 1, with Canada increasing its numbers again in 2021. Figure 1 below shows the number of bison on Manitoba and Canadian farms and ranches from 1996 to 2021.

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<sup>1</sup> Opportunities for the Manitoba Bison Industry – Manitoba Agriculture 2020

<sup>2</sup> National Bison Association

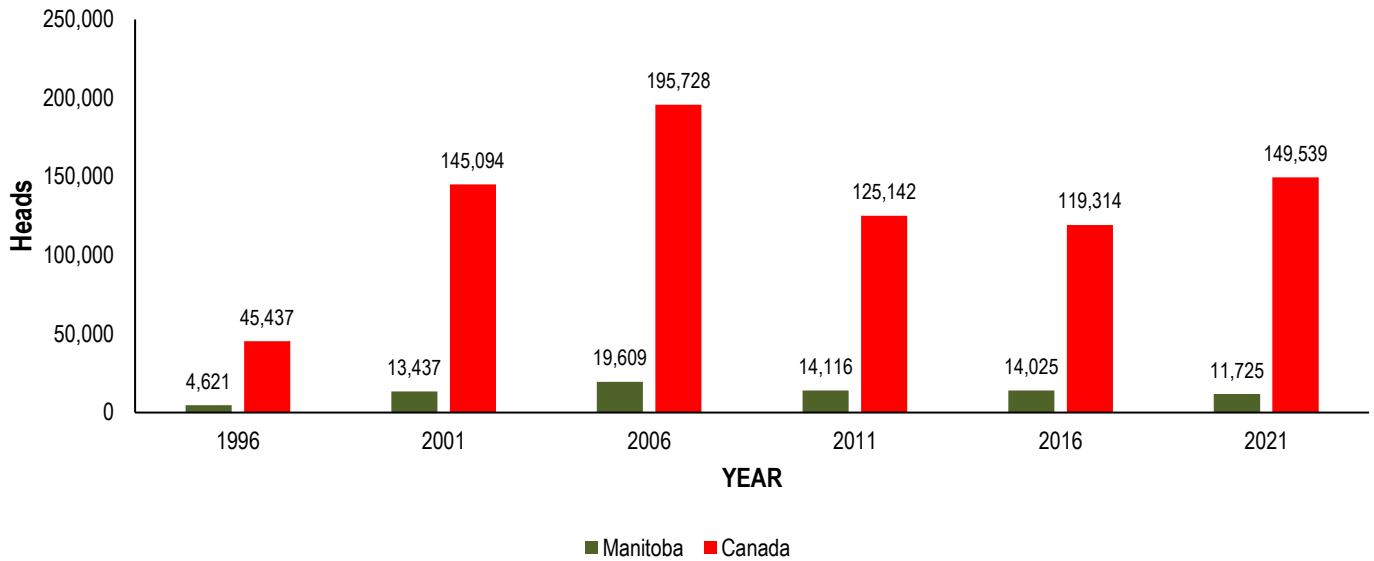
<sup>3</sup> Alternative livestock option for the UK ([www.businesswales.gov.wales](http://www.businesswales.gov.wales))

<sup>4</sup> The use of tariff codes among countries may differ depending on whether they are indexing for imports or exports.

<sup>5</sup> Wild mammals are making a comeback in Europe thanks to conservation efforts ([ourworldindata.org](http://ourworldindata.org))

<sup>6</sup> 2021 Canadian Census of Agriculture

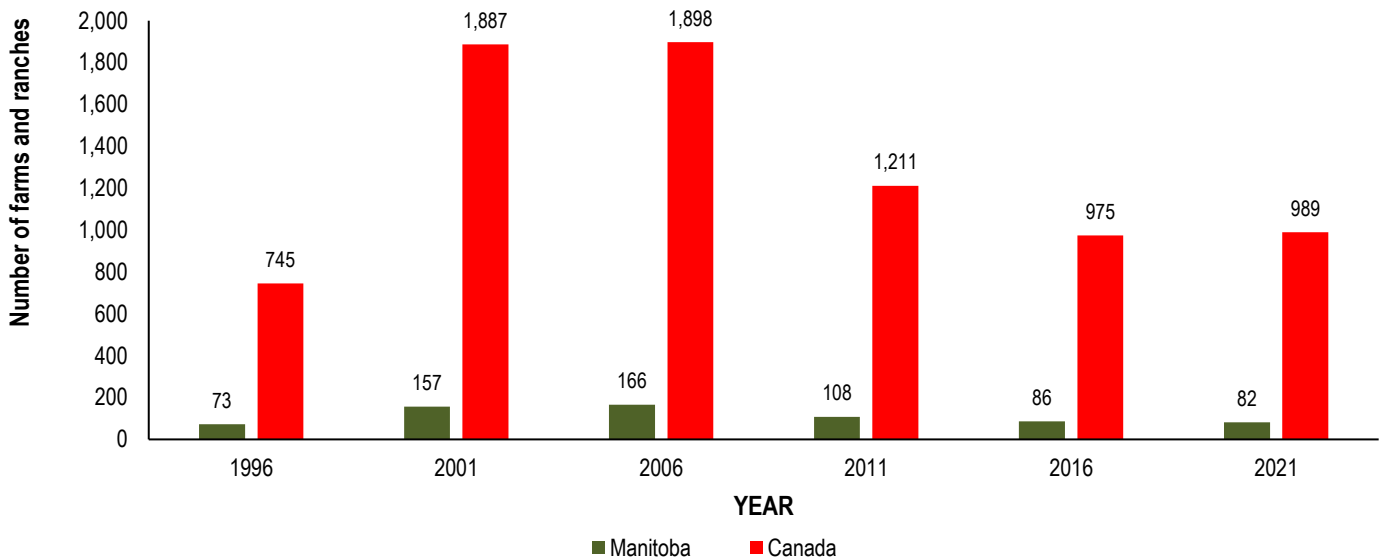
**Figure 1. Number of Bisons on Manitoba and Canadian Farms and Ranches**



Source: Statistics Canada - Table 32-10-0155-01 and Canadian Bison Association

The number of Manitoba farms and ranches reporting bison reached 166 in 2006, before dropping to 82 in 2021. Compared to 1996, the number of bison farms in Manitoba increased by 12.3 per cent. The average number of bison heads per farm in Manitoba increased by 126.9 per cent, from 63 heads in 1996 to 143 heads in 2021. At the national level, the average herd size increased by 147.5 per cent from 61 head in 1996 to 151 head in 2021.

**Figure 2. Number of Farms and Ranches Reporting Bison**

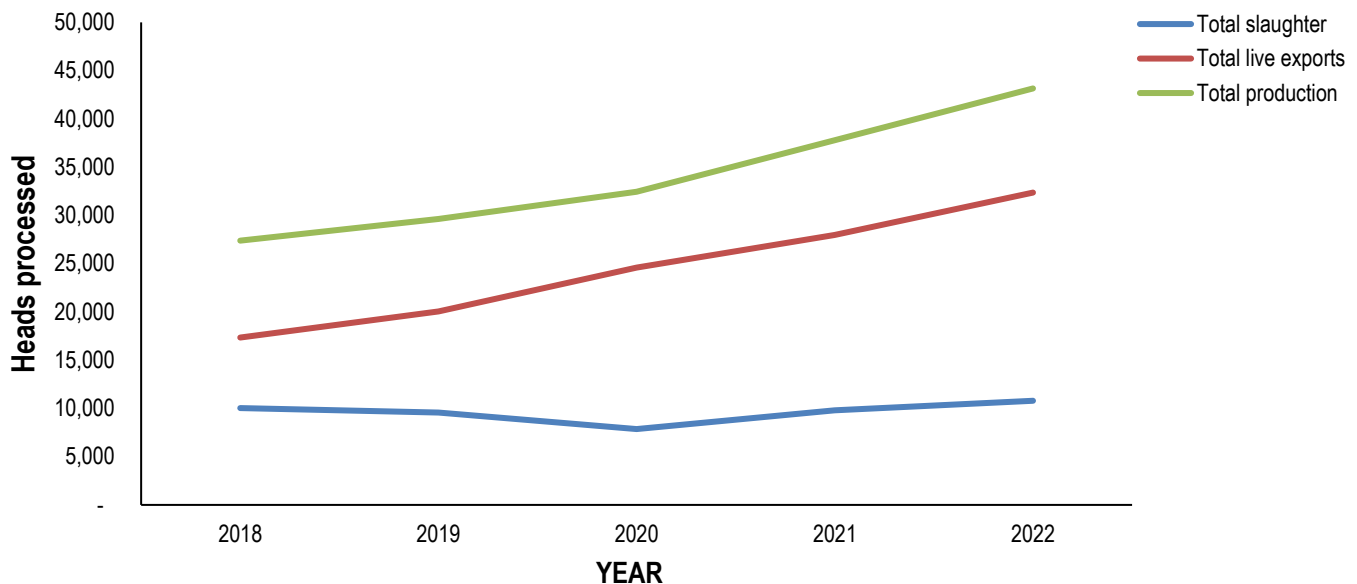


Source: Statistics Canada - Table 32-10-0155-01 and Canadian Bison Association

## Canadian Production and Export

From 2018 to 2022, the total annual bison production increased by 57.6 per cent from 27,383 heads in 2018 to 43,154 heads in 2022. This growth stems from the increase in live bison exports, as shown in Figure 3. Live bison exports increased by 86.6 per cent over the past five years, from 17,342 heads in 2018 to 32,362 heads in 2022. Figure 3 shows the trends in processing numbers, live exports and annual total bison production in Canada from 2018 to 2022.

**Figure 3. Trends in bison processing numbers, live exports and annual total production in Canada from 2018 to 2022**



Source: Bison Market and Supply Update – Agriculture and Agri-Food Canada – February 2023.

Canadian bison exports in value, as shown in Table 1, grew by 6.86 per cent (CAGR) from 2018 to 2022, mainly due to growth in live bison exports (CAGR 7.21 per cent), strong prices, and a favourable exchange rate. On the contrary, the Canadian bison meat exports have dropped steadily over the last five years, showing a CAGR of -20.5 and -26.1 per cent for bison boneless cuts and bison cuts bone-in, respectively. The US continues to be Canada's top destination for bison exports, receiving all live bison exports and 57.5 per cent of bison meat.

**Table 1. Live Bison and Bison Meat Exports (CAN \$) 2018-2022**

Manitoba								
Description	Total \$ 2018-2022	%	2018	2019	2020	2021	2022	CAGR
			\$	\$	\$	\$	\$	%
	51,839,947	100.00	6,805,876	8,267,616	12,310,732	10,671,712	13,784,011	19.3
Live bison	49,607,955	95.69	6,720,514	6,774,640	11,665,598	10,671,712	13,784,011	19.67
Bison cuts boneless (fresh, chilled or frozen)	2,223,472	4.29	85,362	1,492,976	645,134	-	-	-
Canada								
Description	Total \$ 2018-2022	%	2018	2019	2020	2021	2022	CAGR
			\$	\$	\$	\$	\$	%
	443,991,063	100.00	87,482,039	83,628,093	85,461,879	88,752,233	98,666,819	6.86
Live bison	394,468,920	88.85	69,498,925	70,960,575	80,372,694	81,826,123	91,810,603	7.21
Bison cuts boneless (fresh, chilled or frozen)	42,135,884	9.49	14,719,357	12,379,011	3,352,833	5,802,359	5,882,324	-20.49
Bison cuts bone in (fresh, chilled or frozen)	7,386,259	1.66	3,263,757	288,507	1,736,352	1,123,751	973,892	-26.09

Source: Global trade Tracker – July 2023

Manitoba bison exports grew at CAGR 19.30 per cent between 2018 and 2022, mainly driven by an increase in live bison exports (CAGR 19.7 per cent), which accounts for 96 per cent of all bison exports from the province. Manitoba has not recorded any bison meat exports in the last couple of years. Exports of bison meat from Manitoba dropped sharply in 2020 during the COVID-19 pandemic, and have not recovered since then. Manitoba continues exporting live bison, mainly to the US and exports reached \$13.8 million in 2022, accounting for 14 per cent of Canada's total bison exports. Manitoba bison meat was mainly exported to the US during the 2018 to 2022 period, except for a very small amount of bison meat that was exported to Australia in 2020.

Canada's bison meat exports to the US have dropped steadily since 2018. The largest drop was in 2020 when bison meat exports decreased by 72.3 per cent, compared to the previous year. It also reported a CAGR of -31.7 per cent over the 2018 to 2022 period (Table 2).

The European demand for bison meat also declined by 38.9 per cent in 2020 from the previous year, due to the impact of COVID-19 on food services and the substantial increase in freight rates. International reports showed the cost of shipping bison meat to Europe increased by three to four times the pre-COVID freight rates. Changes in demand resulted in a drop in production. In 2022, total Canadian exports of bison meat to the EU have just recovered to the 2018 levels. .

In 2022, the EU became the top destination for Canadian bison meat, accounting for \$3.6 million and a CAGR of 2.8 per cent for the 2018 to 2022 period. The Netherlands, Italy, and France are the top three importers within the European Union. Table 2 (below) shows the destinations of Canada's bison meat exports over the last five years. Manitoba is yet to record any bison meat exports into the EU.

**Table 2. Canada's Bison Meat Export (CAN \$) by Destination, 2018-2022**

Country	Canada							
	Total \$ 2018-2022	%	2018 \$	2019 \$	2020 \$	2021 \$	2022 \$	CAGR %
Total	49,522,143	100.00	17,983,114	12,667,518	5,089,185	6,926,110	6,856,216	-21.42
US	28,486,205	57.52	10,264,354	9,397,494	2,605,484	3,983,996	2,234,877	-31.69
EU	12,140,843	24.52	3,223,890	2,145,934	1,310,731	1,863,363	3,596,925	2.78
<i>Netherlands</i>	5,762,209	11.64	153,614	490,906	638,634	1,290,088	3,188,967	113.45
<i>Italy</i>	1,351,493	2.73	-	315,025	336,270	400,502	299,696	-1.65
<i>France</i>	3,941,346	7.96	2,315,236	1,113,925	296,565	107,358	108,262	-53.50
<i>Saint Pierre and Miquelon</i>	483,285	0.98	483,285	-	-	-	-	-
<i>Luxembourg</i>	27,075	0.05	-	-	-	27,075	-	-
<i>Germany</i>	51,218	0.10	-	2,321	10,557	38,340	-	306.43
<i>Belgium</i>	524,217	1.06	271,755	223,757	28,705	-	-	-67.50
Switzerland	5,697,043	11.50	2,107,047	1,116,443	1,139,985	700,259	633,309	-25.96
United Kingdom	1,808,901	3.65	1,761,079	-	-	29,329	18,493	-67.99
Vietnam	372,612	0.75	-	-	-	-	372,612	-
Countries and territories not specified	7,405	0.01	7,405	-	-	-	-	-
Nicaragua	17,190	0.03	-	-	17,190	-	-	-
Mexico	983,602	1.99	618,644	-	15,795	349,163	-	-17.36
Japan	695	0.00	695	-	-	-	-	-
Albania	7,647	0.02	-	7,647	-	-	-	-

Source: Global trade Tracker – August 2023

Switzerland has been the third top destination of Canadian bison meat since 2018. However, its bison meat imports have significantly dropped after the COVID-19 pandemic, and have not recovered since. The bison industry is highly dependent on the demand from restaurants and other food services as they are the main buyers of high-value bison meats, particularly ribeyes, strips, and tenderloins. While these cuts together account for only nine per cent of typical carcass weight, they account for 25 per cent of the total carcass value. Thus, losing these valuable customers due to the COVID-19-related disruptions was a big hit to the bison industry.

## Opportunities in the European Union

Growth of the EU bison market along with Canada's trade advantages under the Canada-EU Comprehensive Economic and Trade Agreement (CETA) may provide opportunities for Canada and Manitoba to grow in this market. Under the CETA agreement, Canada has a tariff-free export quota of up to 3,000 tonnes<sup>7</sup> of bison meat to the EU, which is estimated at \$50 million in exports.<sup>8</sup> In 2022, Canadian bison meat exports reached only 5.2 per cent of the allowable tariff-free quota to Europe. In addition, other direct competitors, including the U.S. face a 20 per cent duty on bison meat exports shipped to the EU. Canada has an opportunity to increase exports to the EU by leveraging this trade advantage.

The bison industry has positioned its meat products in the premium red meat segment, with popularity among European upscale restaurant chefs. It is also recognized as a sustainable and healthy meat, which aligns well with the EU Sustainability Standards,<sup>9</sup> the increased environmental awareness, and growing consumer interest for health-promoting and naturally-produced products. Bison meat has high nutritional value (high proportion of protein and excellent sources of vitamins) and good palatability traits.<sup>10</sup> Bison meat has lower fat than other red meats, which makes it more appealing to consumers concerned with the health impacts of consuming meats with high fat content. Bison requires low external inputs, less management, and animals are raised without growth stimulants or antibiotics added to their feed. While bison leave a minimal footprint on the environment, they are also considered a keystone species for the role they play in the restoration and maintenance of the Great Plains biodiversity.

Currently, there is limited local bison meat processing capacity in Manitoba. True North Foods is the only federally licensed plant in Manitoba that has processed bison meat for export markets. Processing plants require an infrastructure that can support the processing of a larger and stronger animal than other bovines. Adequate infrastructure would be required to capitalize on growing demand of bison meat.

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<sup>7</sup> Opportunities for the Manitoba Bison Industry – Manitoba Agriculture 2020

<sup>8</sup> EU deal good for the Bison Industry – Canadian Bison Association

<sup>9</sup> European Commission adopts sustainability reporting standards | IR Magazine

<sup>10</sup> Canadian Bison Association



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### **Others:**

Catsnet

Euromonitor

Global Trade Tracker

## Contact us

[www.manitoba.ca/agriculture/](http://www.manitoba.ca/agriculture/)

1-844-769-6224

[industryintelligence@gov.mb.ca](mailto:industryintelligence@gov.mb.ca)

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