

## GMP Dashboard

Table M-1	MAY 2018	JUNE 2018	2017-18 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	37.4	40.6	46.1	14.7%
Average Days In Store – Country	20.1	24.2	28.5	16.3%
Loaded Transit Time	5.5	5.4	6.0	15.8%
Average Days In Store – Terminal	11.8	11.0	11.6	10.5%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	4,594.3	3,415.8	41,978.9	-1.7%
Railway Shipments (all Western Canada traffic)	4,508.2	4,146.4	46,768.0	-0.9%
Western Port Terminal Shipments	3,275.3	2,776.2	31,907.8	-6.4%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	10,651	8,990	11,267	10.6%
Total Western Port Car Cycle (days)	14.3	14.8	15.6	11.8%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	38,863	26,635	344,819	-7.4%
Vessel Time in Port (days)	8.3	7.1	10.3	-1.0%

- Order fulfilment measures have been removed from this table as comparative data is unavailable now.  
 - YTD refers to the crop year to date (extending from August 1 through to the end of this reporting period)

Periodic revisions and corrections to the data received by the Monitor may result in the restatement of previously calculated measurement values. Where such differences arise, the values presented here should be considered to supersede those found in previous reports.

## Overview

Western Canadian rail shipments fell for a second consecutive month in June 2018, to 4.1 MMT from 4.5 MMT in May. This stands below a monthly average of 4.3 MMT, which has produced a 0.9% decline in year-to-date tonnage. Port shipments for June totaled 2.8 MMT, a 15.2% decline from May. Year-to-date shipments from ports have declined by 6.4%. There has also been a decrease in the average amount of time vessels spend in port – from 8.3 days in May to 7.1 in June.

## Highlights for June 2018

### Traffic and Movement (page 2)

- Primary-elevator shipments were 42.0 MMT in the first eleven months of the 2017-18 crop year, 1.7% less than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first eleven months of the crop year totaled 46.8 MMT, down 0.9% from a year earlier. Total rail shipments in June decreased 8.0% compared to May.
- Crop year-to-date shipments from Western Canadian ports totaled 31.9 MMT, down 6.4% from the same period last year.

### System Efficiency and Performance (page 4)

- Year-to-date average weekly primary-elevator stocks increased by 14.6% from last year. The average days-in-store is up 16.3%.
- Average weekly port-terminal stocks increased 4.9% from the same period last year, while average days-in-store climbed 10.5%.
- The average car cycle for hopper-car movements to Western Canadian ports spiked in June 2018, rising to an average of 14.8 days from 14.3 days in May, marking the first increase in three months. Corridor averages through the first eleven months remained elevated: 15.6 days for movements to Western ports; 23.9 days to Eastern Canada; and 27.9 days to the US.
- The year-to-date average for vessel time in port is 10.3 days, 1.0% lower than that observed in the previous crop year.
- Port-terminal out-of-car time fell to 8.8% at Vancouver in June from 15.2% in May. At Prince Rupert, the out-of-car time rose to 27.3% in June, from 8.3% in May and at Thunder Bay to 4.9% from 2.2% the month earlier.

## Production and Supply

The estimate from Statistics Canada's November survey for 2017 crop production in Western Canada stands at 71.9 MMT.

This production estimate registers just 0.9% less than the 2016 production and ranks as the third largest crop grown in Western Canada. While Statistics Canada may incorporate further revisions into future releases, this constitutes the final estimate focused on the 2017 crop.

Coupled with carry-forward stock of 8.6 MMT, 14.4% more than in 2016, the overall grain supply is estimated to be 80.5 MMT. This is 0.5% more than that of the previous year and the second largest next to 81.9 MMT seen in the 2013-14 crop year (77.0 production and 4.9 carry-forward). Given that this crop year experienced a slowdown in movement throughout the first three quarters and the second highest supply of grain, it is expected that the carry forward stocks will be much higher than average, which is 8.4 MMT over the past 5 years.

Table M-2:		2017	2016	Var. from Last Yr.
<b>Production &amp; Carry Over (000's tonnes)</b>				
<b>Western Canada Total Production</b>		71,911.9	72,580.9	-0.9%
<b>Western Canada On Farm &amp; Primary Elevator Carry Forward Stock</b>		8,630.0	7,543.9	14.4%
<b>Total Grain Supply</b>		<b>80,541.9</b>	<b>80,124.8</b>	<b>0.5%</b>

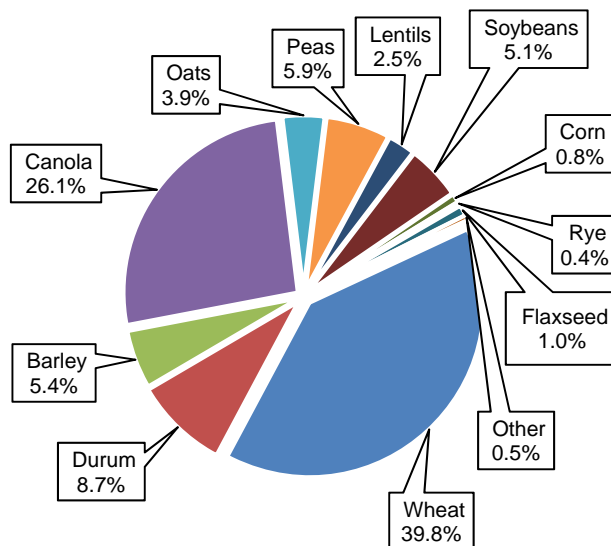
## Traffic and Movement

Deliveries rebounded from May levels to average 1.0 MMT per week for the month of June. Average weekly primary-elevator stock levels grew to 3.0 MMT, with good space available in facilities across the prairies.

Table M-3		JUN 2018	2017-18 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>				
Manitoba		657.1	8,013.7	11.3%
Saskatchewan		1,717.6	20,449.9	-3.5%
Alberta		1,016.7	13,232.2	-5.3%
British Columbia		24.4	283.1	-17.7%
<b>Total</b>		<b>3,415.8</b>	<b>41,978.9</b>	<b>-1.7%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>				
Shipments to Western Ports		3,219.5	35,262.2	-4.7%
Shipments to Eastern Canada		179.1	2,865.4	-8.1%
Shipments to US & Mexico		683.6	7,860.9	20.0%
Shipments Western Domestic		64.2	779.5	39.1%
<b>Total</b>		<b>4,146.4</b>	<b>46,768.0</b>	<b>-0.9%</b>
<b>Western Port Unloads (Number of Cars)</b>				
Vancouver		17,056	226,258	-3.0%
Prince Rupert		2,908	51,846	-16.2%
Thunder Bay		6,671	66,715	-13.6%
<b>Total</b>		<b>26,635</b>	<b>344,819</b>	<b>-7.4%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>				
Vancouver		1,792.5	20,679.2	-3.5%
Prince Rupert		296.4	4,770.5	-12.3%
Churchill		0.0	0.0	n/a
Thunder Bay		687.3	6,458.1	-10.5%
<b>Total</b>		<b>2,776.2</b>	<b>31,907.8</b>	<b>-6.4%</b>



## Primary Elevator Shipments by Commodity

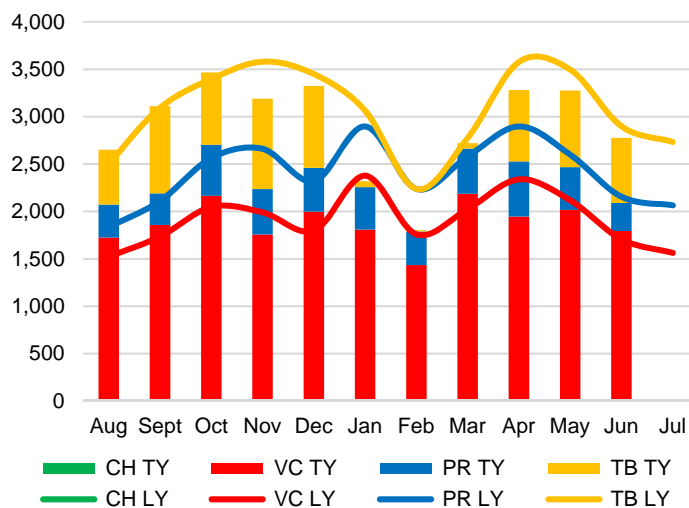


**Total YTD = 42.0 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators decreased in June and registered 1.7% less than the crop-year-to-date total for the previous year. Wheat, durum and canola continue to constitute the largest proportion of the movement at 74.6%. Movement of peas and lentils have fallen dramatically, to 8.4% of the total, from 12.4% a year earlier as both tariff and non-tariff trade barriers challenge the marketing of these pulse crops.

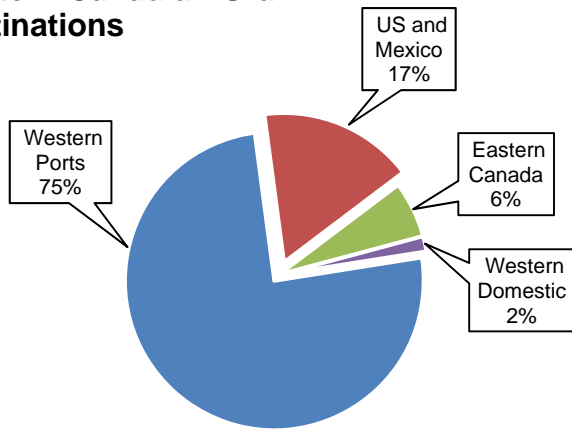
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments out of the western ports fell in the first eleven months of the crop year, registering a 6.4% decrease on a year-over-year basis. June shipments saw a 4.2% reduction from the tonnage shipped in the same month in 2017.

## Western Canadian Grain Destinations

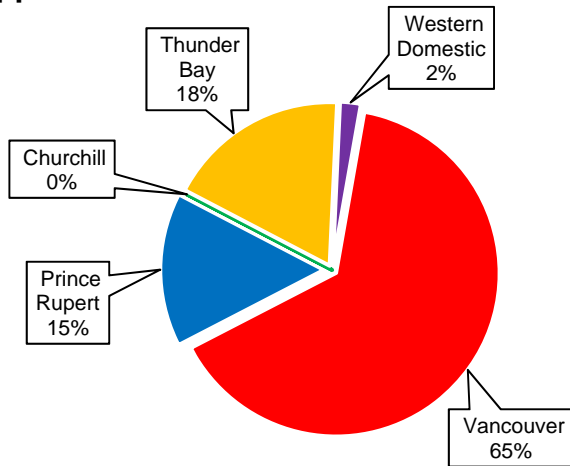


Total YTD = 46.8 MMT

GMP Data Tables 2B-1, 2B-8 & 2B-15

Railway grain shipments from Western Canada totaled 46.8 MMT in the first eleven months of the 2017-18 crop year, a 0.9% decline from that handled a year earlier. The majority, about 35.3 MMT, was directed to Western Canadian ports in support of export sales. However, this proved 4.7% less than what had been shipped in the previous year. Shipments to Eastern Canada also declined, falling by 8.1%. These volume reductions were partially offset by sharp increases in: Western domestic shipments, up 39.1%; along with US and Mexican shipments, which were up by 20.0%.

## Western Canadian Destined Hopper Car Traffic



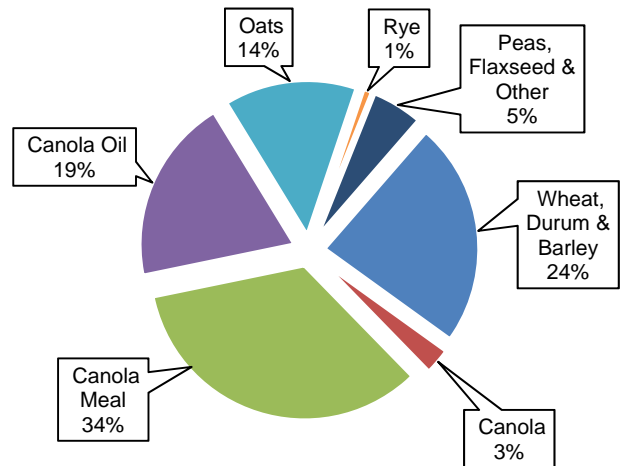
Total YTD - 34.2 MMT

GMP Data Tables 2B-3 to 2B-7

Over 95% of the tonnage directed to destinations within Western Canada moves in covered hopper cars. During the first eleven months of the 2017-18 crop year this amounted to 34.2 MMT, down 4.9% from a year earlier. On the receiving end, 65% of these hopper cars were destined to Vancouver, which remains the highest volume port for export grain given its ready access to Asia-Pacific markets, favourable logistical economics and year-round

operations. Even so, hopper-car shipments through Vancouver during this period declined by 4.6%. This decline in tonnage was enlarged by losses at Prince Rupert and Thunder Bay, which fell by 3.5% and 10.4% respectively.

## US Destined Grain by Commodity

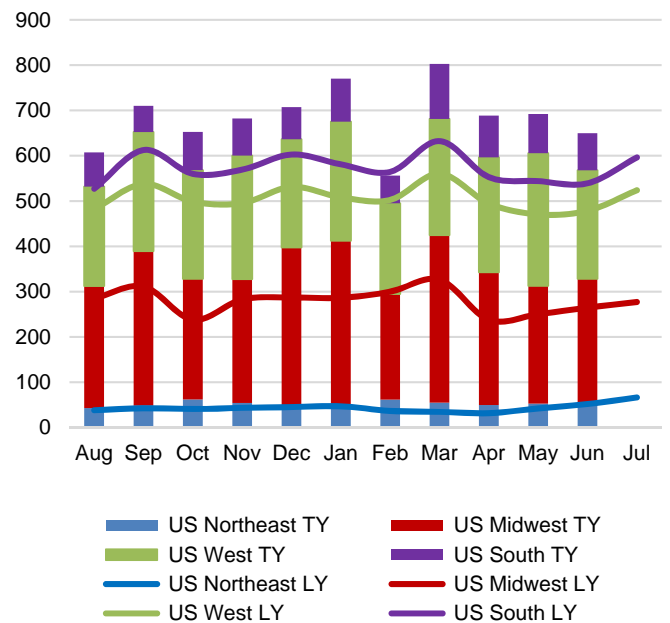


Total YTD - 7.5 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached slightly over 7.5 MMT in the first eleven months of the 2017-18 crop year, a gain of 19.6% over the tonnage moved in the same period of the previous year. Over 80% of these shipments are directed into the US Midwest and West and are dominated by canola and canola products.

## US Destined Grain by Destination Territory (000's tonnes)



GMP Data Table 2B-18

## System Efficiency and Performance

Primary elevator stocks built up modestly in June to average 3.0 MMT as producers completed seeding and resumed heavier grain deliveries. Overall space in the country system was good. Country stocks utilized 62% of the working capacity of the network. By province, stocks ranged from 53% of working capacity in British Columbia to 59% and 61% in Saskatchewan and Manitoba respectively, and 69% in Alberta.

The average days-in-store in the primary-elevator system for the eleven-month period increased substantially from last year, climbing 16.3%.

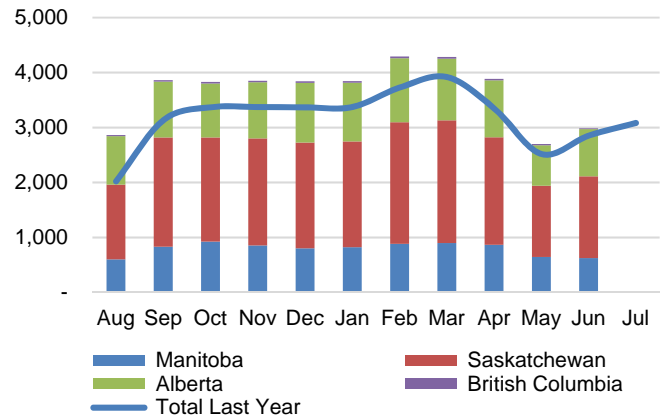
Table M-4	JUN 2018	2017-18 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	2,984.7	3,623.5	14.7%
Average Days in Store	24.2	28.5	16.3%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	14.8	15.6	11.8%
Cycle Time to Eastern Canada	24.5	23.9	14.9%
Cycle Time to US	26.3	27.9	13.8%
Loaded Transit to Western Ports	5.4	6.0	15.8%
Loaded Transit to Eastern Canada	11.1	10.9	23.8%
Loaded Transit to US	11.4	12.0	23.3%
Rail Fleet in Grain Service	18,456	21,360	3.4%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,124.5	1,208.2	4.9%
Average Days in Store	11.0	11.6	10.5%
Port Unloads (hopper cars)	26,635	344,819	-7.4%
Terminal Out-of-Car Time	10.7%	11.6%	-5.6%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	7.1	10.3	-1.0%

*Car order and order fulfillment data is not complete from both railways and will not be reported until further notice.*



Construction of new gallery at AGT, Vancouver

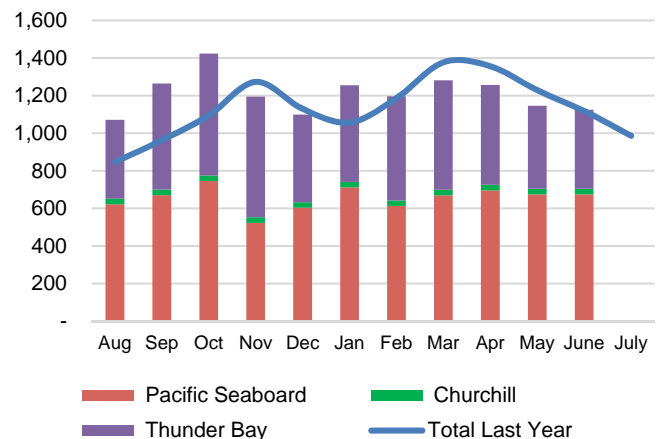
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Following a decline to 2.9 MMT in August, average country elevator stocks reversed direction and rose to 4.3 MMT by mid-winter. They remained high until the onset of seeding when stocks declined to average 2.7 MMT in May. In June, they rebounded to 3.0 MMT, while the year-to-date average weekly stock level in the first eleven months of the crop year was 3.6 MMT, a 14.7% increase from a year earlier. Wheat, including durum, and canola, comprise over 71% of the total stock. At 16% of the stock, barley, oats and peas made up much of the balance. Of the remaining commodities, soybeans, constituting 5% of primary elevator stock, is the most substantial.

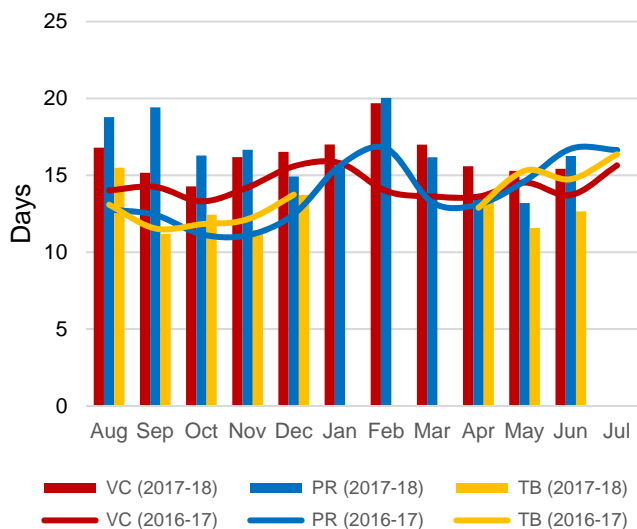
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.1 MMT in June, 2% less than a month earlier. While stock levels declined modestly at Thunder Bay, they held constant at the Pacific Seaboard (Vancouver and Prince Rupert). Wheat, including durum, and canola, comprise over 81% of the total stock. In June, western ports utilized only 65% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

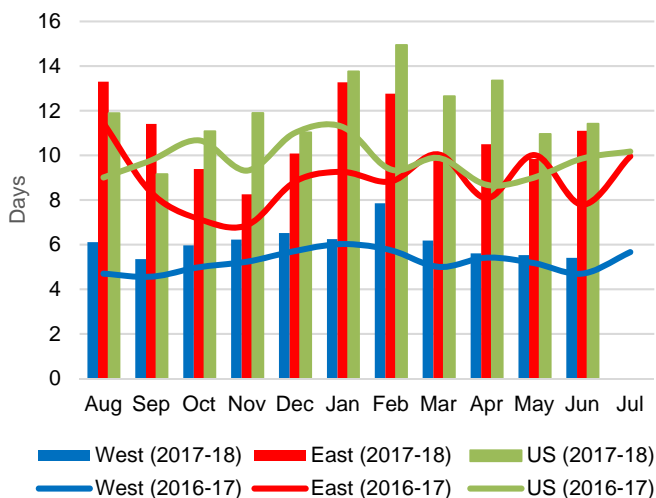


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 15.6 days in the first eleven months of the 2017-18 crop year, an increase of 11.8% over the 14.0-day average reported in the same period a year earlier. This was largely the result of increases in the West-Coast corridors, with the Prince Rupert average rising by 19.3% and the Vancouver average by 13.5%. Running counter to these was the Thunder Bay average, which fell by 2.7%.

Car cycles to Eastern Canada also increased during this period, rising by 14.9%, to an average of 23.9 days from 20.8 days a year earlier. The car cycle for movements into the United States rose by a slightly lesser 13.8%, to an average of 27.9 days versus 24.5 days in the previous year.

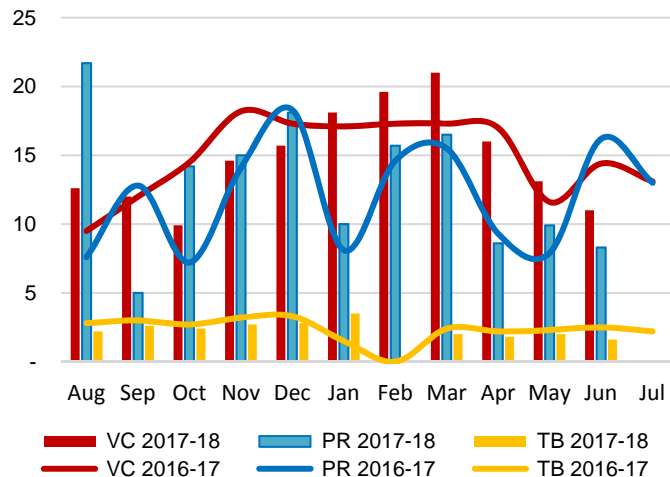
## Average Loaded Transit Times (days)



GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 6.0 days in the first eleven months of the 2017-18 crop year, up 15.8% from the 5.2-day average of a year earlier. This was primarily the result of increases in the Prince Rupert and Vancouver corridors, which rose by 26.5% and 16.9% respectively. This was partially offset by a modest 2.2% decrease in the Thunder Bay-corridor average. The average loaded transit time for movements into Eastern Canada also increased sharply, rising by 23.8%, to 10.9 days from 8.8 days a year earlier. The corresponding average for US-destined traffic saw a similar increase, rising by 23.3%, to 12.0 days from the 9.7-day average posted a year earlier.

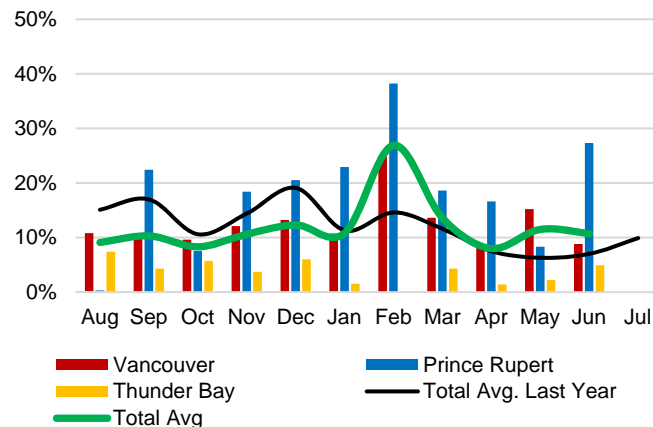
## Average Days in Port per Vessel



GMP Data Table 5D-1

In June, the overall average time vessels were in port waiting and loading grain was 7.1 days, 29.0% lower than in June of 2017 and the lowest monthly average seen this crop year. It was also 14.5% less than that seen in May. All three western ports registered decreases. For the month the days in port stood at 11.0 for Vancouver, 8.3 for Prince Rupert and 1.6 at Thunder Bay.

## Port Terminal Out-of-Car Time (% of total operating hours)



GMP Data Table 5C-5

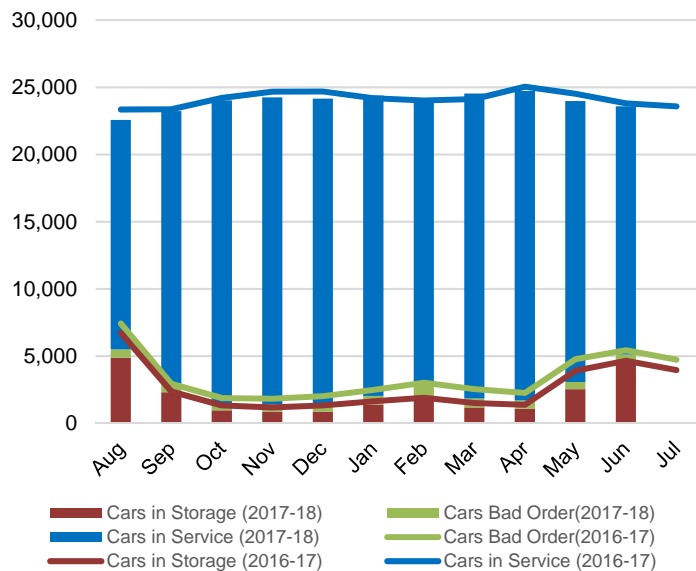




The port terminal out-of-car time measure represents the total number of hours terminal elevator facilities are open and staffed (including overtime hours) and the corresponding number of hours that terminals have no rail cars available to unload. The measure is expressed as a percentage (hours without cars to the total number of hours working).

Notwithstanding some fluctuation, the percentage of time terminals are out of cars has charted a trend of improvement from its high of 29.8% in January of 2015. The aggregate measure for all ports fell to 10.7% in June from 11.5% in May. Terminal out-of-car time at Vancouver declined to 8.8% in June, while climbing to 27.3% at Prince Rupert and 4.9% at Thunder Bay.

### Railway Grain Fleet Size and Utilization



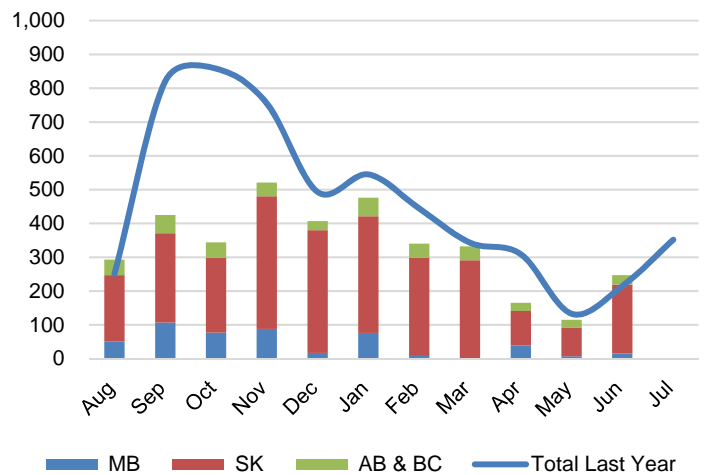
GMP Data Table 3B-2

During times of heavy demand for grain hopper cars, nearly all of the hopper-car fleet is placed in service. It is normal practice for railways to move cars into storage as traffic volumes decrease in the latter months of the crop year. This was the case in the 2016-17 crop year as in July 2017, a weekly average of 18,832 cars, representing 80% of the fleet was in active service. With growing

demand, the cars in service rose throughout this crop year to average 23,013 per week in April before declining to an average of 18,456 per week by June, encompassing 78% of the overall fleet. The balance of the fleet, comprising 22% of the rail cars, is in storage or repair status (bad order).

## Producer Cars

### Producer Cars Scheduled by Province



GMP Data Table 6B-2

Producer car shipments have shifted from primarily being wheat, durum, and oats to reflect a significant increase in the number of cars carrying special crops. Shipments throughout the first eleven months of the 2017-18 crop year continue to reflect this trend, with the traditional commodities comprising only 71% of the total. Special crops such as peas, lentils and chickpeas contributed 16% of the current volume.



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This report provides a summary of the data developed under the Grain Monitoring Program. Detailed monthly Data Tables can be found in Excel format on Quorum's website at: [www.grainmonitor.ca](http://www.grainmonitor.ca)

Quorum welcomes questions and comments on the reports and data. Please contact us at our address by either phone or email

