

## GMP Dashboard

Table M-1	FEB 2020	MAR 2020	2019-20 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	61.4	46.6	44.7	-2.8%
Average Days In Store – Country	41.7	30.9	26.1	-5.5%
Loaded Transit Time	11.6	7.8	7.6	-4.0%
Average Days In Store – Terminal	8.1	7.9	11.0	4.8%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	3,047.4	4,124.3	31,980.8	-1.0%
Railway Shipments (all Western Canada traffic)	3,617.5	5,116.7	36,650.4	1.6%
Western Port Terminal Shipments	2,268.8	2,842.0	23,417.0	-1.7%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	11,981	12,652	10,947	-11.4%
Total Western Port Car Cycle (days)	21.5	16.8	17.0	4.3%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	22,486	29,318	249,408	-3.5%
Vessel Time in Port (days)	25.9	22.3	13.2	17.4%

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

## Overview

With the lifting of the blockades that had impeded railway movement in February 2020 Western Canadian grain shipments rebounded sharply in March 2020, climbing 41.4% to 5.1 MMT from 3.6 MMT a month earlier. This strong showing helped lift year-to-date shipments to almost 36.7 MMT, 1.6% above the 36.1 MMT forwarded in the same eight-month period a year earlier, and overcome the prior burdens imposed by a delayed harvest, an eight-day strike at CN in November, temporary speed restrictions, and mainline washouts. Port shipments for March totaled 2.8 MMT, a 25.2% increase from February. Along with the increase in shipments has been a decrease in the average amount of time vessels spend in port – falling to 22.3 days in March from 25.9 in February, with the average for the first eight months of the crop year standing at 13.2 days.

## Highlights for March 2020

### Traffic and Movement (page 2)

- Primary-elevator shipments were 32.0 MMT in the first eight months of the 2019-20 crop year, 1.0% less than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first eight months of the 2019-20 crop year totaled 36.7 MMT, up 1.6% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 23.4 MMT, down 1.7% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks decreased by 6.0% while the average days-in-store fell by 5.5%.
- Average weekly port-terminal stocks decreased 2.6% from the same period last year, while average days-in-store grew by 4.8% on a year-over-year basis.
- The car cycle for hopper-car movements to Western Canadian ports, which were adversely impacted by mainline washouts and widespread railway blockades in February 2020, fell by 21.9% in March, with the preliminary average decreasing to 16.8 days from 21.5 days a month earlier. The year-to-date average rose by 4.3%, to 17.0 days from 16.3 days a year earlier. The average car cycle on movements to Eastern Canada also increased, rising by 2.0%, to 23.1 days, while that on movements to the US fell by 3.8%, to 26.0 days.
- The year-to-date average for vessel time in port is 13.2 days, 17.4% higher than that observed in the previous crop year.
- Port-terminal out-of-car time decreased to 15.1% at Vancouver in March from 26.3% in February and at Prince Rupert, to 14.0% in March, from 28.0% in February. Thunder Bay out-of-car time registered 9.1% in March.

## Production and Supply

Statistics Canada's November survey for 2019 crop production in Western Canada stands at 73.5 MMT, a 2.4% increase from the 2018 harvest. This constitutes the second largest crop on record. This production estimate reflects a reduction of 1.7 MMT from the model-based estimate released by Statistics Canada in September, marking the challenging fall weather conditions and inability to complete harvest prior to the arrival of winter.

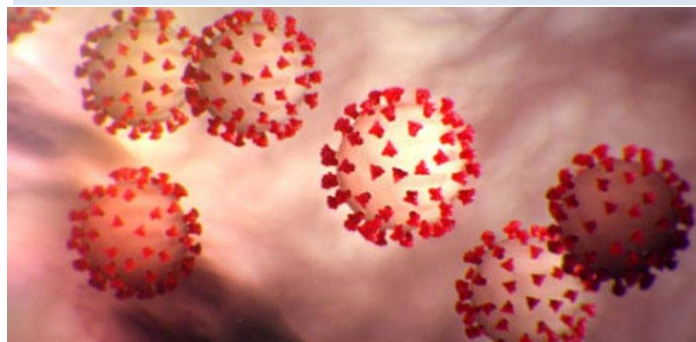
Coupled with carry-forward stock of 9.4 MMT at the end of July 2019, 9.3% less than in 2018, the overall grain supply is estimated to be 82.8 MMT. Year-end on-farm carry-forward stock was boosted 1.0 MMT in Statistics Canada's February release. The projected supply is 0.9% more than that of the previous year, and registers as the largest on record ensuring heavy demands on the GHTS throughout the crop year.

Table M-2	2019	2018	Var. from Last Yr.
<b>Production &amp; Carry Over (000's tonnes)</b>			
Western Canada Total Production	73,455.2	71,723.6	2.4%
Western Canada On Farm & Primary Elevator Carry Forward Stock	9,367.5	10,329.6	-9.3%
<b>Total Grain Supply</b>	<b>82,822.7</b>	<b>82,053.2</b>	<b>-0.9%</b>

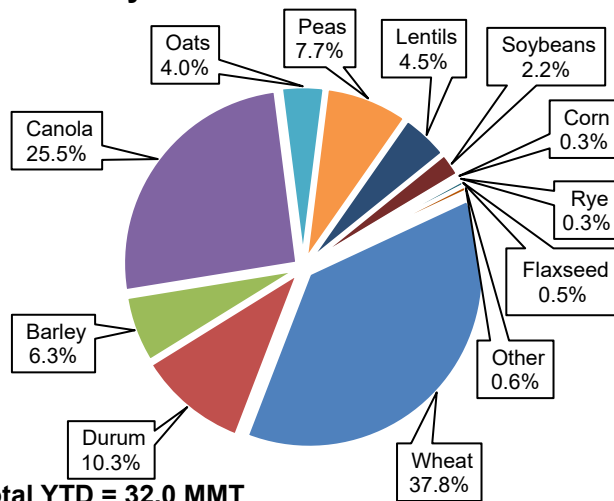
## Traffic and Movement

Recovering from landslides and blockades, March producer deliveries averaged over 1.0 MMT per week. Average weekly primary-elevator stock levels held at 4.6 MMT, as they were in February, with constricted space in facilities prairies wide.

Table M-3	MAR 2020	2019-20 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	560.0	5,405.5	-6.1%
Saskatchewan	2,300.7	17,583.3	0.0%
Alberta	1,232.9	8,714.1	-0.1%
British Columbia	30.7	277.9	8.7%
<b>Total</b>	<b>4,124.3</b>	<b>31,980.8</b>	<b>-1.0%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	3,788.0	28,229.7	0.5%
Shipments to Eastern Canada	539.6	2,770.1	6.2%
Shipments to US & Mexico	676.9	4,926.8	0.7%
Shipments Western Domestic	112.2	723.8	51.3%
<b>Total</b>	<b>5,116.7</b>	<b>36,650.4</b>	<b>1.6%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	22,914	160,337	-4.7%
Prince Rupert	4,952	35,893	-14.6%
Churchill	0	1,434	n/a
Thunder Bay	1,452	51,744	7.3%
<b>Total</b>	<b>29,318</b>	<b>249,408</b>	<b>-3.5%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	2,175.5	15,181.6	-2.0%
Prince Rupert	402.4	3,265.6	-17.8%
Churchill	0.0	137.3	410.4%
Thunder Bay	264.1	4,832.9	12.0%
<b>Total</b>	<b>2,842.0</b>	<b>23,417.4</b>	<b>-1.7%</b>



## Primary Elevator Shipments by Commodity

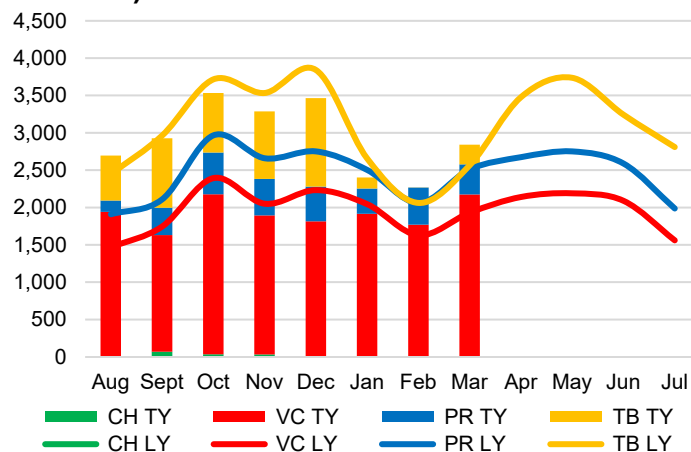


GMP Data Table 2A-1

As the month of March ended, the COVID 19 situation has not had a significant impact on grain movement. The volumes handled would in fact indicate a return to near normal levels.

Grain shipments from primary elevators fell in the first eight months of the crop year, registering 1.0% less than the crop-year-to-date total for the previous year. Wheat, including durum, and canola continue to constitute the largest proportion of the movement at 73.6%. Movement of peas and lentils were relatively consistent in the month, constituting 12.2% of the total, up from 12.1% in February.

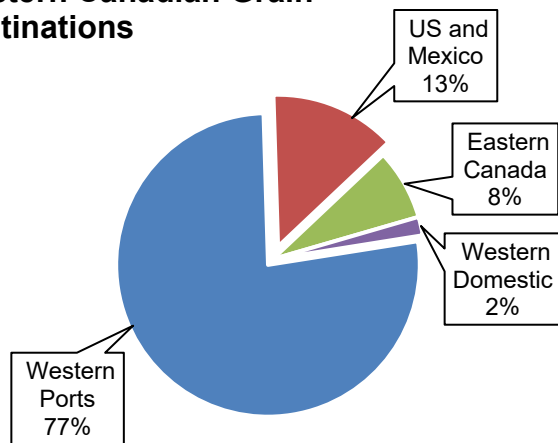
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments out of the western ports fell in the first eight months of the 2019-20 crop year, registering a decline of 1.7% on a year-over-year basis. Prince Rupert registered the largest decline at 17.8% followed by Vancouver falling 2.0%, while Thunder Bay shipments recorded an increase of 12.0% from the previous crop year, augmented by a burst of activity at the opening of the 2020 shipping season.

## Western Canadian Grain Destinations

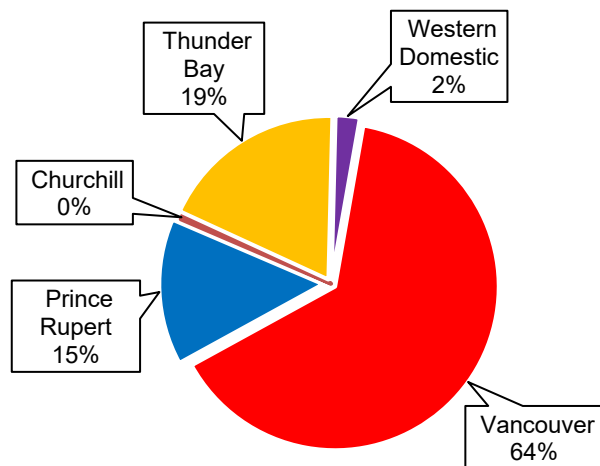


Total YTD = 36.7 MMT

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

Railway grain shipments from Western Canada totaled almost 36.7 MMT in the first eight months of the 2019-20 crop year, a 1.6% increase over the 36.1 MMT handled a year earlier. The majority, about 28.2 MMT, was directed to Western Canadian ports in support of export sales. This represented a 0.5% gain over what had been shipped the previous year. Shipments to the US and Mexico also rose, with a gain of 0.7%. Sharper increases were noted in Eastern Canadian and Western Domestic traffic volumes, with year-over-year gains of 6.2% and 51.3% respectively.

## Western Canadian Destined Hopper Car Traffic



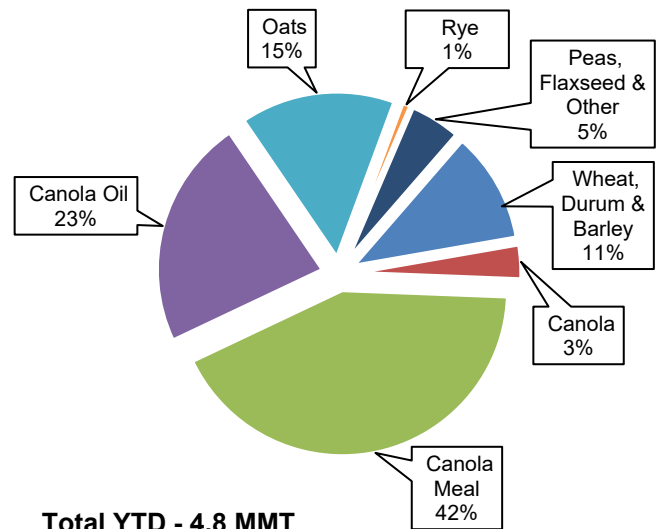
Total YTD - 27.5 MMT

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 eight months of the 2019-20 crop year this amounted to 27.5 MMT, up 1.2% from a year earlier. Sixty-four percent of these hopper cars were destined to Vancouver, which remains the busiest grain-

exporting port owing to its ready access to Asia-Pacific markets, favourable logistical economics and year-round operations. Hopper-car shipments through Vancouver during this period fell by 0.4%. A more substantive 12.6% volume decline was recorded by Prince Rupert, extending a trend that has resulted in high vessel lineups, and extensively longer time in port. Conversely, Thunder Bay shipments rose by 13.8%; Western Domestic, 60.0%; along with shipments through the reopened port of Churchill.

## US Destined Grain by Commodity

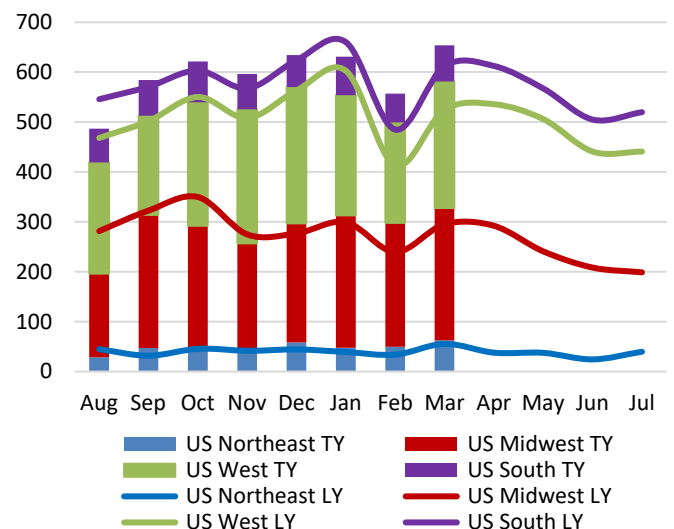


Total YTD - 4.8 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached almost 4.8 MMT in the first eight months of the 2019-20 crop year, up 2.0% from the tonnage moved in the same period a year earlier. Almost 80% of these shipments were directed into the US Midwest and West, with canola and canola products being dominant.

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



GMP Data Table 2B-18

## System Efficiency and Performance

Primary elevator stocks held in March, averaging 4.6 MMT with heavy demand for prairie grain following a winter of disruptions. Overall space in the country system was tight. Country stocks utilized 91% of the working capacity of the network. By province, stocks ranged from 80% of working capacity in Manitoba, to 88% in Saskatchewan, and 100% in both Alberta and British Columbia.

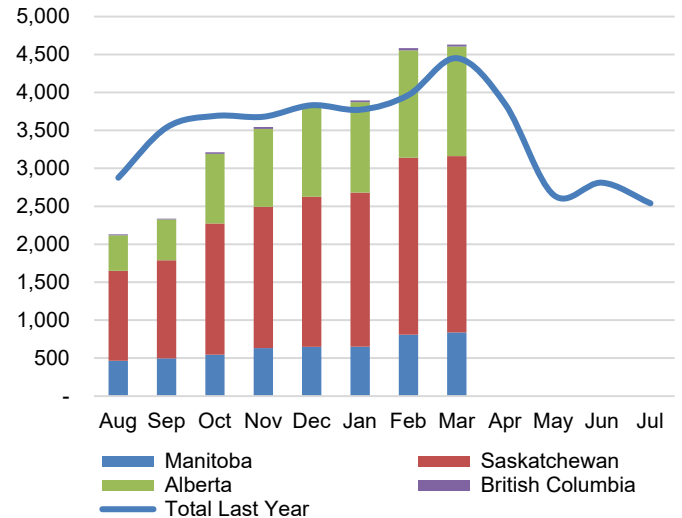
Corresponding to a significant month-over-month decrease in March, the average days-in-store in the primary-elevator system for the first eight months of the crop year is down 5.5%.

Table M-4	MAR 2020	2019-20 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	4,630.3	3,501.0	-6.0%
Average Days in Store	30.9	26.1	-5.5%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	16.8	17.0	4.3%
Cycle Time to Eastern Canada	27.5	23.1	2.0%
Cycle Time to US	25.1	26.0	-3.8%
Loaded Transit to Western Ports	7.8	7.6	-4.0%
Loaded Transit to Eastern Canada	14.1	10.9	-0.4%
Loaded Transit to US	11.5	9.9	-12.6%
Rail Fleet in Grain Service	23,835	21,905	-4.4%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,366.9	1,170.8	-2.6%
Average Days in Store	7.9	11.0	4.8%
Port Unloads (hopper cars)	29,318	249,408	-3.5%
Terminal Out-of-Car Time	14.8%	11.8%	-9.9%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	22.3	13.2	17.4%

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



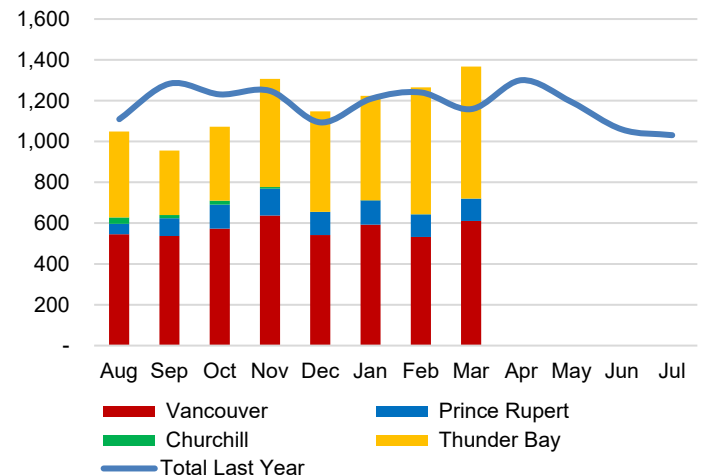
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.5 MMT in store. In August, they pulled back further to average 2.1 MMT before reversing direction and rising to average 4.6 MMT in February and March. Wheat, including durum, and canola, comprise 73% of the total stock. At 18% of the stock, barley, oats and peas made up much of the balance.

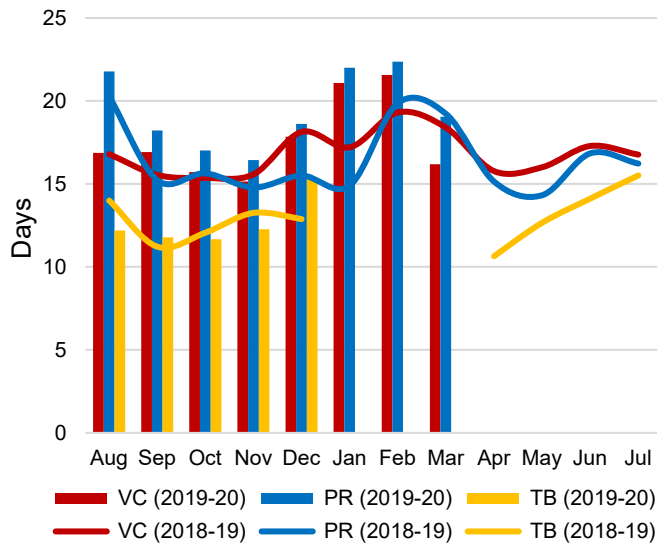
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.4 MMT in March, 8% higher than a month earlier. Average weekly stock levels built at Vancouver and Thunder Bay reflecting the start of operations for G3's Vancouver Terminal and preparations for the opening of the shipping season respectively. At the same time stocks held constant at Prince Rupert. Overall, they registered 18.0% higher than in March 2019. Wheat, including durum, and canola, comprise over 81% of the total stock. In March, western ports utilized 77% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

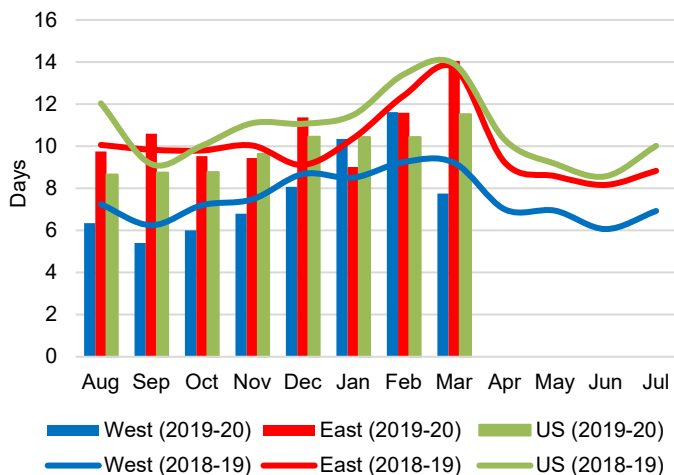


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 17.0 days in the first eight months of the 2019-20 crop year, up 4.3% from the 16.3-day average reported in the same period a year earlier. This was largely the result of increases in the Vancouver and Prince Rupert corridors, which saw increases of 3.4% and 15.0% respectively. These were supported by a 1.8% increase in the Thunder Bay average.

Car cycles to Eastern Canada also increased during this period, rising by 2.0%, to an average of 23.1 days from 22.6 days a year earlier. The car cycle for movements into the United States increased by 3.8%, to an average of 26.0 days from 25.0 days.

## Average Loaded Transit Times (days)

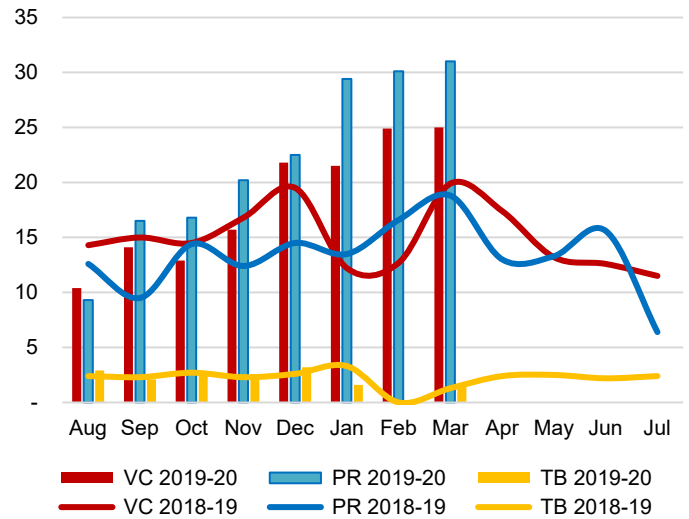


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 7.6 days in the first eight months of the 2019-20 crop year, down 4.0% from the 7.9-day average posted a year earlier. This was primarily the result of decreases in the Vancouver and

Thunder Bay corridors, which fell by 5.1% and 13.2% respectively. Running counter to these was an increase in the Prince Rupert average, which rose by 14.5%. Movements into Eastern Canada fell by a marginal 0.4%, with the average remaining effectively unchanged at 10.9 days. The average for US-bound traffic saw a deeper decline, falling 12.6%, to 9.9 days from the 11.4-day average posted a year earlier.

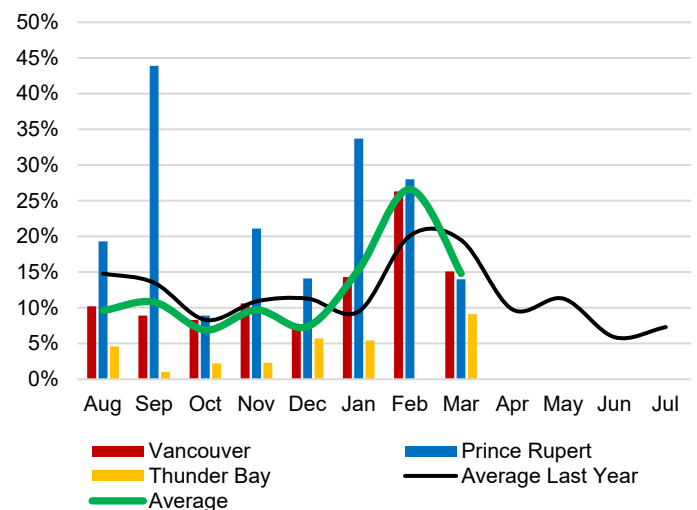
## Average Days in Port per Vessel



GMP Data Table 5D-1

In March, the overall average time vessels were in port waiting and loading grain was 22.3 days, nearly 20% greater than it was in March 2019. Despite this elevated level, the average is 13.9% lower than that seen in the previous month, due to Thunder Bay's seasonal opening. Both west coast ports registered increases from February. In March, the average days in port stood at 25.0 for Vancouver, 31.0 at Prince Rupert and 1.7% at Thunder Bay.

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

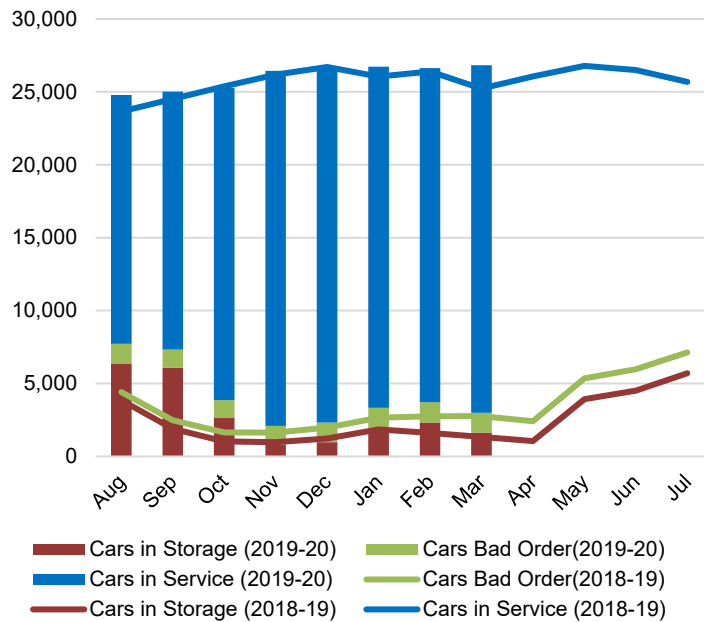


GMP Data Table 5C-5

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).

The aggregate measure for all ports fell to 14.8% in March from 26.6% in February. Terminal out-of-car time at Vancouver decreased to 15.1% and to 14.0% at Prince Rupert. Thunder Bay registered 9.1% for time out-of-cars as it geared up for the opening of the shipping season.

### Railway Grain Fleet Size and Utilization



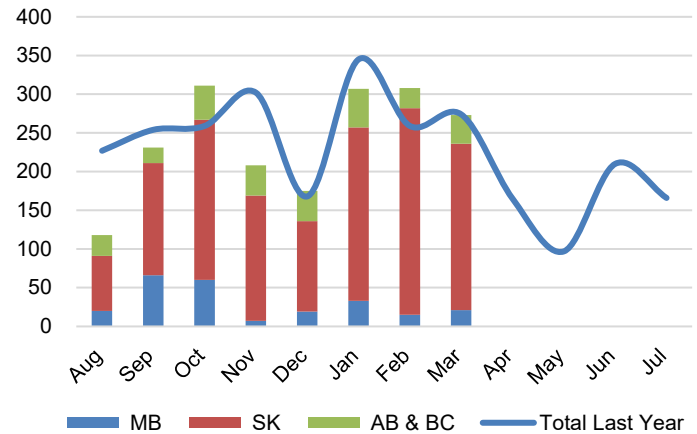
GMP Data Table 3B-2

During times of heavy demand for grain hopper cars, nearly all 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 2018-19 crop year as in July 2019, a weekly average of 18,548 cars representing 72% of the fleet, was in active service. Cars in

service fell further in August, to 17,062 before reversing direction and rising to 24,343 by December. While January and February saw a pull-back to 22,905 cars in service in February, the fleet once again increased to 23,835 cars in March. The overall-average cars in service for the first eight months of this crop year was 21,905 per week, representing 84% of the total fleet. The balance of the fleet, comprising 16% of the rail cars, was in storage or repair status (bad order).

## Producer Cars

### Producer Cars Scheduled by Province



GMP Data Table 6B-2

While producer car shipments scheduled for March 2020 were even with those in March a year ago, the eight-month total for the crop year to date has fallen 7.5% as the number of applications placed with the Canadian Grain Commission declined. Year-to-date shipments saw oats comprising 57% of the total, while wheat and durum made up 18% of the movement. Special crops such as peas, lentils and chickpeas contributed 12% of the volume.



**Quorum Corporation**  
 Suite 701, 9707 – 110 Street  
 Edmonton, AB T5K 2L9  
 Email: [info@quorumcorp.net](mailto:info@quorumcorp.net)  
 Web: [www.grainmonitor.ca](http://www.grainmonitor.ca)  
 Phone: (780) 447-2111

This report provides a summary of the data developed under the Grain Monitoring Program. Detailed monthly Data Tables can be found in Excel and in an open data format (GMODS) 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 by either phone or email

