

## GMP Dashboard

Table M-1	OCT 2021	NOV 2021	2021-22 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	48.5	57.1	49.9	33.8%
Average Days In Store – Country	30.2	35.9	30.4	29.4%
Loaded Transit Time	6.3	5.5	5.7	-14.2%
Average Days In Store – Terminal	12.0	15.7	13.8	39.4%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	3,658.6	3,160.6	13,958.3	-29.0%
Railway Shipments (all Western Canada traffic)	4,689.2	3,340.7	15,317.5	-32.7%
Western Port Terminal Shipments	3,237.2	2,472.9	10,437.1	-36.3%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	10,086	8,460	7,994	-36.0%
Total Western Port Car Cycle (days)	14.2	13.1	15.2	5.9%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	33,987	23,015	111,718	-35.5%
Vessel Time in Port (days)	8.3	8.6	8.0	-28.3%

*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

Western Canadian railway grain shipments fell by 28.8% in November 2021, to 3.3 MMT from 4.7 MMT in October. The decline reflected the effects of washouts and landslides caused by record rainfalls that severed key road and rail routes into Vancouver during the latter half of the month. YTD shipments were similarly impacted, falling by 32.7%. Port shipments for November totaled 2.5 MMT, 23.6% less than in October, and a 44.1% decline from those in November 2020. Accompanying the month-over-month decline in shipments was an increase in the average amount of time vessels spend in port, which grew to 8.6 days in November from 8.3 in October.

## Highlights for November 2021

### Traffic and Movement (page 2)

- Primary-elevator shipments were 14.0 MMT in the first four months of the 2021-22 crop year, 29.0% less than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first four months of the 2021-22 crop year totaled 15.3 MMT, down 32.7% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 10.4 MMT in first four months of the crop year, down 36.3% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks decreased by 9.0% while the average days-in-store grew by 29.4%.
- Average weekly port-terminal stocks decreased 9.4% from the same period last year, while average days-in-store climbed by 39.4% on a year-over-year basis.
- The car cycle for hopper-car movements to Western Canadian ports fell by 7.7% in November 2021, with the preliminary average decreasing to 13.1 days from 14.2 days in October. However, the YTD average of 15.2 days stood 5.9% greater than that posted a year earlier. A more substantial increase was noted in the car cycle for movements into Eastern Canada, which rose by 15.4% to 25.2 days. However, movements into the US saw a 2.6% reduction, with the average cycle falling to 23.6 days from 24.2 days.
- The year-to-date average for vessel time in port is 8.0 days, 28.3% less than that observed in the previous crop year.
- Port-terminal out-of-car time grew to 47.3% at Vancouver in November from 14.0% in October. At Prince Rupert, out-of-car time remained at 0.0% in November. At Thunder Bay it fell to 2.1%, up from 5.9% the month earlier.

## Production and Supply

Statistics Canada's November survey for 2021 field-crop production in Western Canada stands at 47.0 MMT, a 40.2% decrease from 2020's record 78.5 MMT harvest. This dramatic decline reflects the impact of the prairie-wide drought during the growing season. The survey of producers' harvested acreage and yield was conducted between 8 October and 12 November 2021. It resulted in a decrease in the overall production estimate of 0.6 MMT from the model-based estimate published in September.

When coupled with July's 7.1 MMT of carry-forward stocks, some 15.7% less than in 2020, the overall grain supply is estimated at 54.0 MMT. This stands 37.8% below the 2020-21 crop year's 86.9-MMT record, ranking as the smallest grain supply since the drought-reduced shortfalls of 2001 to 2003.

Table M-2	2021	2020	Var. from Last Yr.
<b>Production &amp; Carry Forward (000's tonnes)</b>			
<b>Western Canada Total Production</b>	46,967.2	78,527.7	-40.2%
<b>Western Canada On Farm &amp; Primary Elevator Carry Forward Stock</b>	7,066.1	8,378.6	-15.7%
<b>Total Grain Supply</b>	<b>54,033.3</b>	<b>86,906.3</b>	<b>-37.8%</b>

## Traffic and Movement

November producer deliveries declined, averaging just over 0.8 MMT per week. Average weekly primary-elevator stock levels held at 4.0 MMT as was the case in October, with good space in the elevator system throughout the month.

Table M-3	NOV 2021	2021-22 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
<b>Manitoba</b>	636.7	3,072.4	-19.1%
<b>Saskatchewan</b>	1,475.1	6,561.1	-38.4%
<b>Alberta</b>	1,021.4	4,205.9	-17.9%
<b>British Columbia</b>	27.4	118.9	17.6%
<b>Total</b>	<b>3,160.6</b>	<b>13,958.3</b>	<b>-29.0%</b>

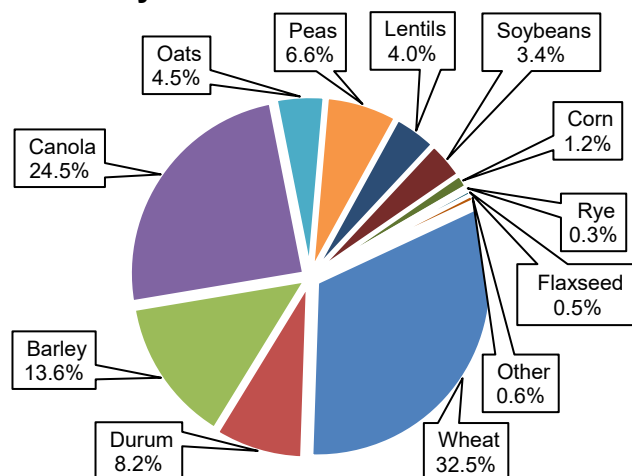
<b>Western Canada Railway Traffic (000's tonnes)</b>			
<b>Shipments to Western Ports</b>	2,498.1	11,792.2	-37.8%
<b>Shipments to Eastern Canada</b>	206.0	858.8	-27.2%
<b>Shipments to US &amp; Mexico</b>	585.5	2,352.1	0.2%
<b>Shipments Western Domestic</b>	51.1	314.5	14.5%
<b>Total</b>	<b>3,340.7</b>	<b>15,317.5</b>	<b>-32.7%</b>

<b>Western Port Unloads (Number of Cars)</b>			
<b>Vancouver</b>	12,367	74,065	-33.9%
<b>Prince Rupert</b>	2,851	8,659	-57.7%
<b>Churchill</b>	0.0	0.0	-100.0%
<b>Thunder Bay</b>	7,797	28,994	-26.5%
<b>Total</b>	<b>23,015</b>	<b>111,718</b>	<b>-35.5%</b>

<b>Terminal Elevator Shipments (000's tonnes)</b>			
<b>Vancouver</b>	1,474.7	7,028.4	-34.6%
<b>Prince Rupert</b>	273.4	740.7	-60.3%
<b>Churchill</b>	0.0	0.0	-100.0%
<b>Thunder Bay</b>	724.8	2,668.0	-27.7%
<b>Total</b>	<b>2,472.9</b>	<b>10,437.1</b>	<b>-36.3%</b>



## Primary Elevator Shipments by Commodity

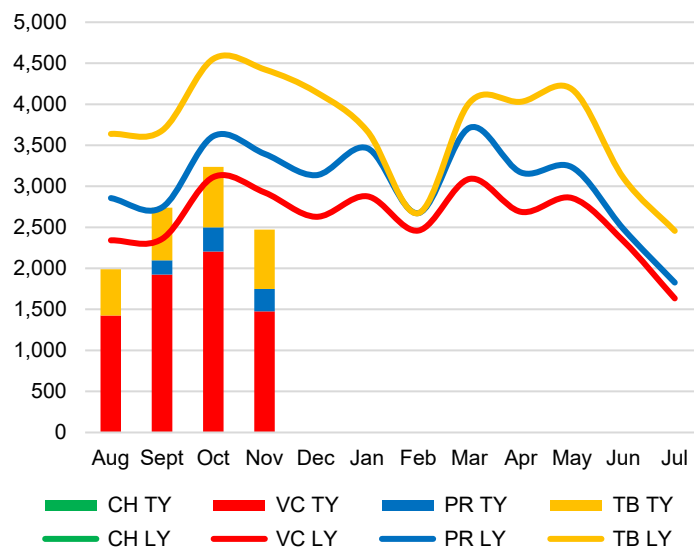


**Total YTD = 14.0 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators fell in the first four months of the crop year, registering 29.0% less than in same period the previous year. Wheat, including durum, and canola continue to constitute the largest proportion of the movement at 65.2%. Movement of peas and lentils contributed 10.6% of the total.

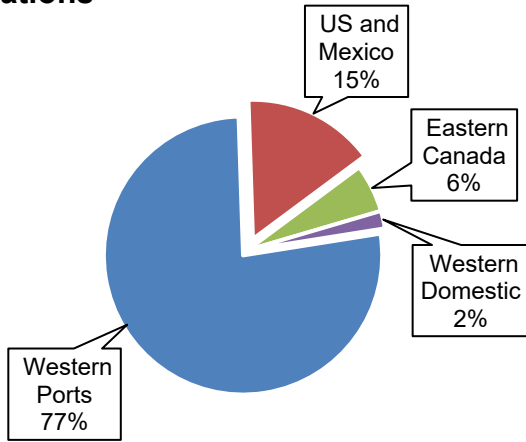
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments out of the western ports fell in the first four months of the 2021-22 crop year, registering a decrease of 36.3% from the same period in the previous year. All ports registered significant declines in activity mirroring the overall reduction in grain supply. Vancouver was down 34.6%, Prince Rupert was off by 60.3% and Thunder Bay shipments recorded a decrease of 27.7%.

## Western Canadian Grain Destinations

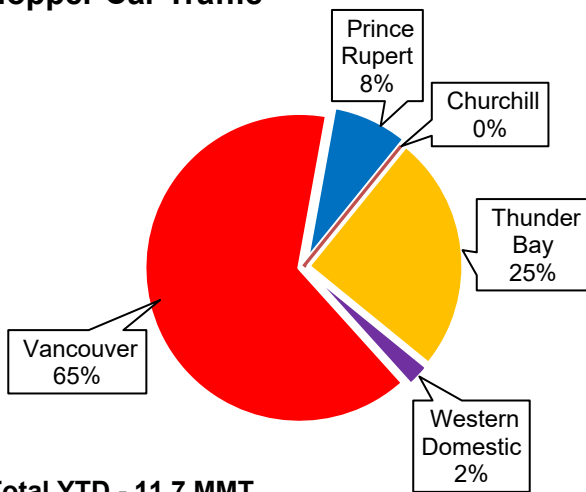


Total YTD = 15.3 MMT

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

Railway grain shipments from Western Canada totaled just over 15.3 MMT in the first four months of the 2021-22 crop year, a 32.7% decrease from the 22.7 MMT handled a year earlier. The majority, about 11.8 MMT, was directed to Western Canadian ports in support of export sales. This represented a 37.8% decline from what had been shipped in the same period the previous year, with the reduction partially offset by a 14.5% increase in Western Domestic traffic. A lesser 27.2% decline was noted on movements into Eastern Canada. Shipments to the US and Mexico rose by a marginal 0.2%.

## Western Canadian Destined Hopper Car Traffic



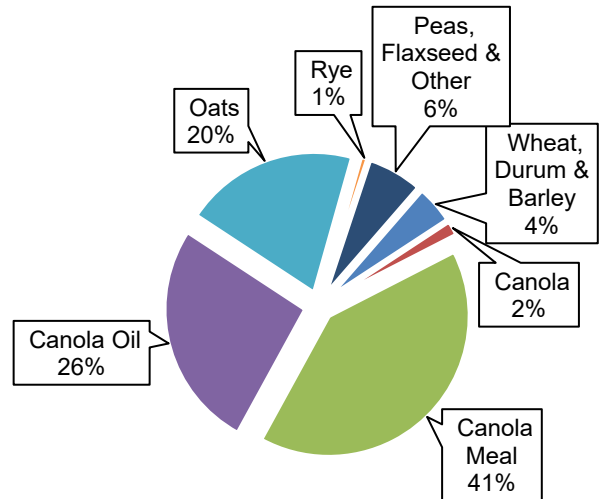
Total YTD - 11.7 MMT

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

Over 95% of the tonnage directed to destinations within Western Canada moves in covered hopper cars. In the first four months of the 2021-22 crop year this amounted to over 11.7 MMT, down 36.4% from the previous November. Sixty-five percent of these hopper cars were destined to Vancouver, which remains the port

of choice for exporting grain, given its access to Asia-Pacific markets and concentration of export terminal facilities. Hopper-car shipments through Vancouver during this period fell by 37.6%. The west-coast reduction was broadened by a 55.4% decline in Prince Rupert traffic as well, but tempered by a 12.6% gain in Western Domestic volumes. Shipments to Thunder Bay also declined, with volume down 24.2%, while the port of Churchill reported no export grain shipments at all.

## US Destined Grain by Commodity

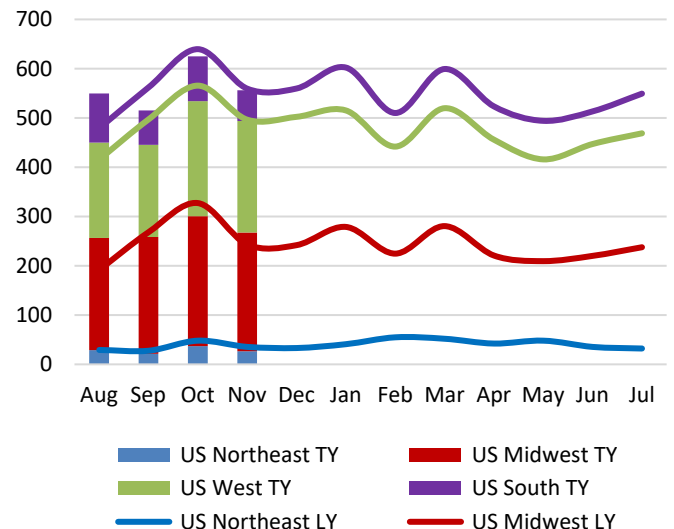


Total YTD - 2.2 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached over 2.2 MMT in the first four months of the 2021-22 crop year, up 0.2% from the tonnage moved in the same period a year earlier. Over 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

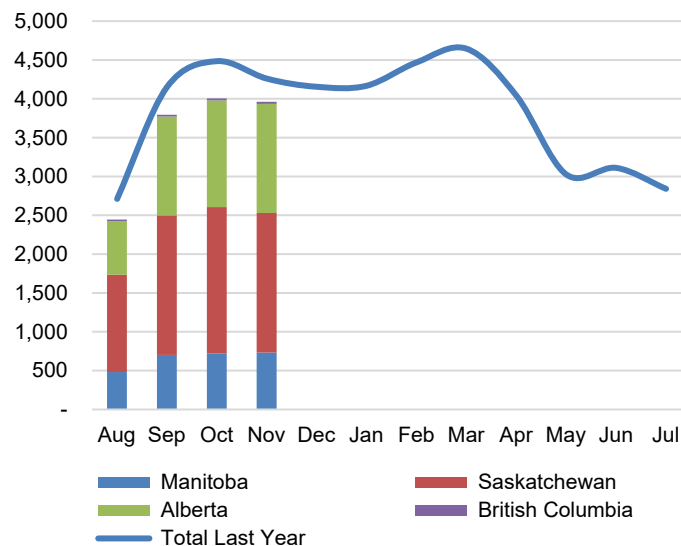
Primary elevator stocks held steady in November, averaging 4.0 MMT as producer deliveries subsided in the post-harvest period. Overall space in the country system was good. Country stocks utilized 73% of the working capacity of the network. By province, stocks ranged from 66% and 69% of working capacity in Saskatchewan and Manitoba respectively, to 87% in Alberta, and 100% in British Columbia.

The average days-in-store in the primary-elevator system for the first four months of the crop year climbed from the same period last year, rising 29.4% to 30.4 days.

Table M-4	NOV 2021	2021-22 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	3,960.8	3,565.5	-9.0%
Average Days in Store	35.9	30.4	29.4%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	13.1	15.2	5.9%
Cycle Time to Eastern Canada	21.2	25.2	15.4%
Cycle Time to US	21.0	23.6	-2.6%
Loaded Transit to Western Ports	5.5	5.7	-14.2%
Loaded Transit to Eastern Canada	11.0	12.1	5.6%
Loaded Transit to US	8.7	9.7	-4.6%
Rail Fleet in Grain Service	17,200	16,123	-30.5%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,405.8	1,187.8	-9.4%
Average Days in Store	15.7	13.8	39.4%
Port Unloads (hopper cars)	23,015	111,718	-35.5%
Terminal Out-of-Car Time	33.5%	16.9%	15.0%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	8.6	8.0	-28.3%
<i>Car order and order fulfillment data is not complete from both railways and will not be reported until further notice.</i>			



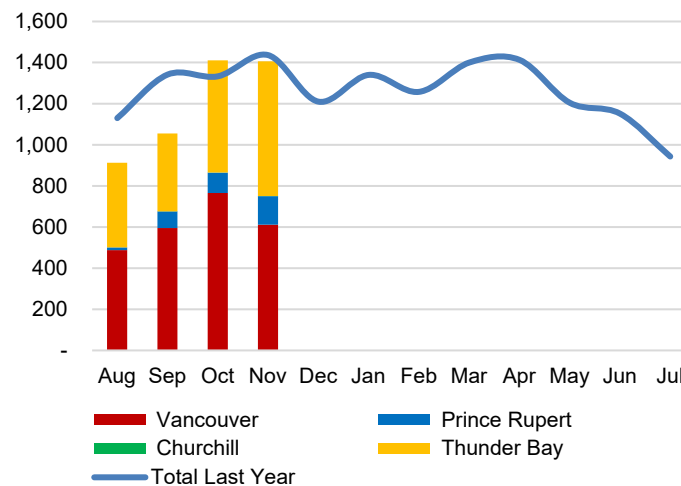
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.8 MMT in store. In August, they pulled back further to average 2.4 MMT before rising to 4.0 MMT in November. Wheat, including durum, and canola, comprise 72% of the total stock. At 18% of the stock, barley, oats and peas made up much of the balance.

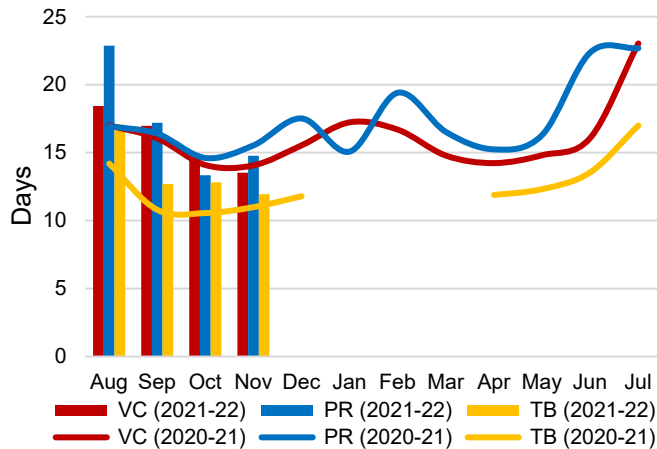
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.4 MMT in November, the same as the previous month. Average weekly stock levels fell at Vancouver while growing at Prince Rupert and Thunder Bay. The lineup of ships at ports registered a significant reduction in numbers from that experienced a year ago due to the smaller harvest and grain supply. Wheat, including durum, and canola, comprise just over 78% of the total stock. In November, western ports utilized just 73% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

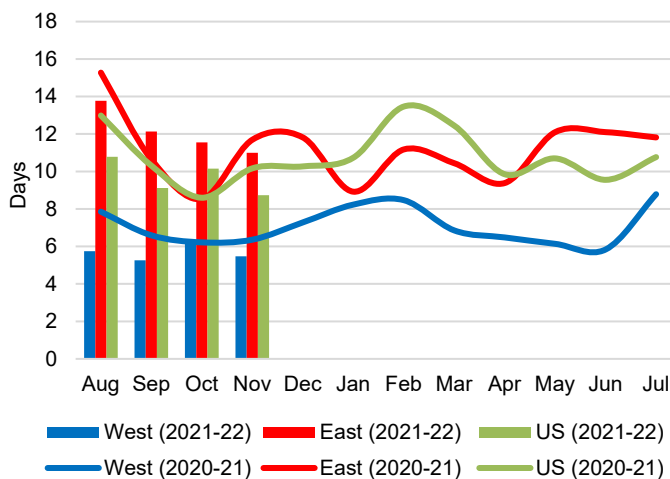


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 15.2 days in the first four months of the 2021-22 crop year, up 5.9% from the 14.4-day average reported a year earlier. This was due to increases in two of the primary corridors, with the Vancouver average increasing 6.0%, and the Thunder Bay average 16.0%. The Prince Rupert average fell by 3.9%.

The car cycle into Eastern Canada also increased, rising by 15.4%, to an average of 25.2 days from 21.8 days a year earlier. Running counter to these increases was a 2.6% reduction in the cycle for US movements, which fell to an average of 23.6 days from 24.2 days the previous November.

## Average Loaded Transit Times (days)

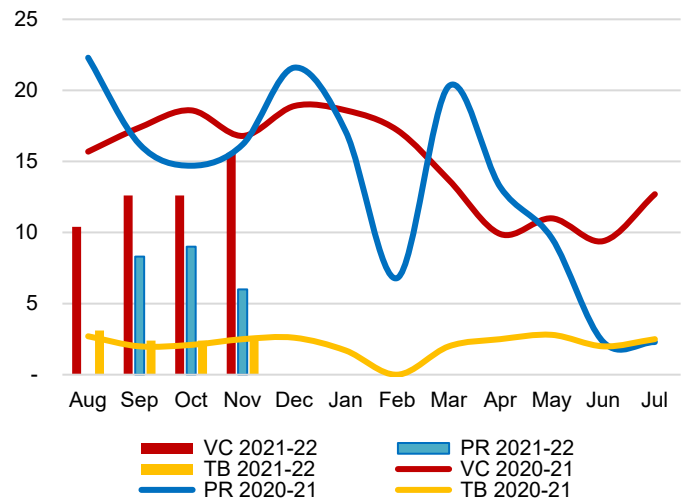


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 5.7 days in the first four months of the 2021-22 crop year, down 14.2% from the 6.6-day average posted a year earlier. This was driven by sizeable reductions in the Vancouver and Prince Rupert corridors, which fell by 16.6% and 28.7% respectively. These declines were partially offset by a 6.4% increase in the Thunder Bay corridor average. Similarly, the

average into Eastern Canada rose by 5.6%, to 12.1 days from 11.5 days a year earlier. The average on US-bound traffic fell by 4.6%, to 9.7 days from 10.2 days.

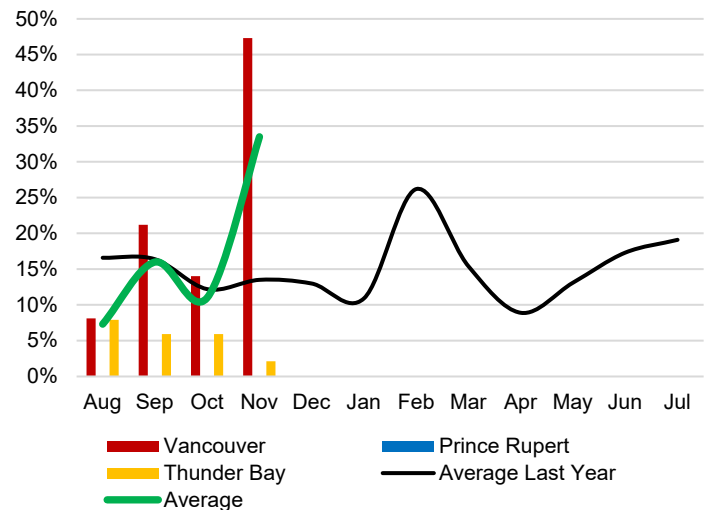
## Average Days in Port per Vessel



GMP Data Table 5D-1

In November, the overall average time vessels were in port waiting and loading grain was 8.6 days, 19.4% less than was the case in November 2020. Despite this lower year-over-year level, the average is 3.6% higher than that seen in the previous month. While Vancouver's average grew, Prince Rupert saw the average decline from October's level. Thunder Bay's average remained essentially the same as the previous month. In November, the average days in port stood at 15.6 for Vancouver, 6.0 for Prince Rupert and 2.5 at Thunder Bay.

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



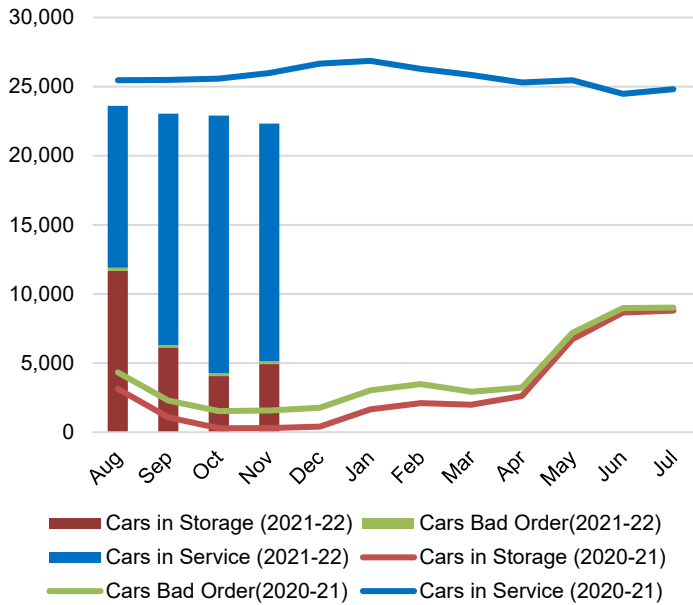
GMP Data Table 5C-5

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 rose to 33.5% in November from 11.0% in October. Terminal out-of-car time at Vancouver increased to 47.3% while remaining at 0.0% at Prince Rupert. Thunder Bay registered a decrease to 2.1% for time out-of-cars.

### Railway Grain Fleet Size and Utilization



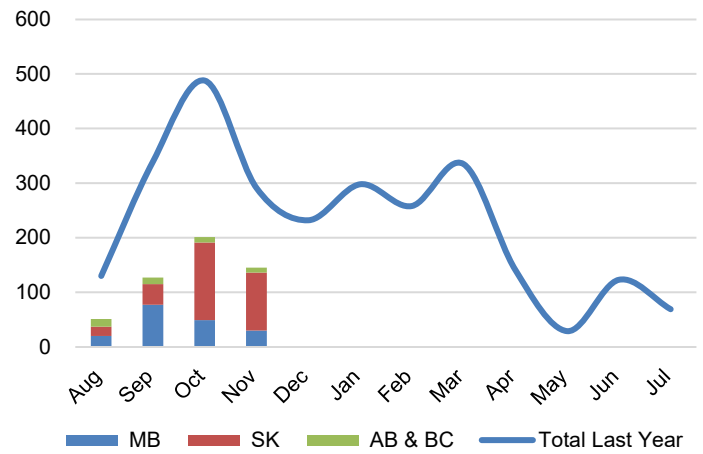
GMP Data Table 3B-2

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 2020-21 crop year as in July 2021, a weekly average of 15,781 cars representing 64% of the fleet, was in active service. Cars in service fell further in August, to an average of 11,713 per week

before reversing direction and climbing to 18,617 per week in October. November saw a pullback to 17,200 cars in service. The average cars in service for the first four months of this crop year represents 70% of the total fleet. The balance of the fleet, comprising 30% of the rail cars, was in storage or repair status (bad order).

### Producer Cars

#### Producer Cars Scheduled by Province



GMP Data Table 6B-2

Producer car shipments scheduled for November 2021 were 50.2% less than those in November a year ago. While the previous crop year saw oats shipments constituting 55% of overall producer cars scheduled, the first four months of the 2021-22 crop year registered oats increasing to 59% of the overall producer-car number. Other cereal-crop shipments constitute 30% of the total.



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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 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

