

## GMP Dashboard

Table M-1	OCT 2022	NOV 2022	2022-23 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	34.2	37.1	38.6	-22.8%
Average Days In Store – Country	20.4	21.5	23.1	-24.1%
Loaded Transit Time	4.9	5.7	5.3	-8.1%
Average Days In Store – Terminal	8.9	9.9	10.2	-26.1%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	5,476.1	6,073.5	18,849.3	35.9%
Railway Shipments (all Western Canada traffic)	6,501.4	5,761.1	20,001.5	31.3%
Western Port Terminal Shipments	4,386.8	4,908.7	13,920.9	32.3%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	11,092	11,295	8,990	12.5%
Total Western Port Car Cycle (days)	12.1	12.2	13.5	-13.9%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	45,506	54,163	154,342	37.5%
Vessel Time in Port (days)	7.6	10.5	8.4	5.4%

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

Western Canadian railway grain shipments decreased by 11.4% in November 2022, to 5.8 MMT from 6.5 MMT in October. The decline follows a first-quarter surge that helped lift the year-to-date tonnage to 20.0 MMT, 31.3% more than in the same four-month period a year earlier. Port shipments for November totaled 4.9 MMT, an 11.9% increase from October. They were 96.5% larger than those in November 2021 when washouts of road and rail infrastructure cut off most access to Vancouver. Accompanying the year-to-date increase in shipments was an increase in the average amount of time vessels spent in port, which grew to 10.5 days in November from 7.6 in October.

## Highlights for November 2022

### Traffic and Movement (page 2)

- Primary-elevator shipments were 18.3 MMT in the first four months of the 2022-23 crop year, 35.9% more 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 2022-23 crop year totaled 20.0 MMT, up 31.3% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 13.9 MMT in the first four months of the crop year, up 32.3% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks decreased by 0.2% while the average days-in-store fell by 24.1%.
- Average weekly port-terminal stocks decreased 6.7% from the same period last year, while average days-in-store fell by 26.1% on a year-over-year basis.
- The preliminary average car cycle for hopper-car movements to Western Canadian ports increased by 0.8%, to 12.2 days in November from 12.1 days in October. Higher velocities in the first quarter helped reduce the YTD average to 13.5 days, 13.9% below the 15.7 days posted a year earlier. Movements into the US also decreased, with the YTD average falling by 1.5% to 23.5 days, while movements into Eastern Canada witnessed a 5.1% increase, to an average of 26.6 days.
- The year-to-date average for vessel time in port is 8.4 days, 5.4% more than that observed in the previous crop year.
- Port-terminal out-of-car time decreased to 9.6% at Vancouver in November from 11.3% in October. Prince Rupert saw a jump to 19.2% in out-of-car time in November, from 4.0% in October, while Thunder Bay realized a modest increase to 9.1% from 8.5% the previous month.

## Production and Supply

Statistics Canada's November-survey estimate for 2022 field-crop production in Western Canada stands at 73.8 MMT, a 50.6% increase from 2021's 49.0 MMT harvest. This dramatic increase reflects a solid rebound from the prairie-wide drought that severely reduced production the previous growing season. This estimate represents a 1.4 MMT reduction from the previous model-based estimate recorded at the end of August.

When coupled with July's 3.8 MMT of carry-forward stocks, some 49.3% less than in 2021, the overall grain supply is estimated at 77.6 MMT. This stands 37.3% above the 2021-22 crop year's 56.6-MMT level, marking the return of an abundant grain supply to meet domestic and export demands.

Table M-2	2022	2021	Var. from Last Yr.
<b>Production &amp; Carry Forward (000's tonnes)</b>			
Western Canada Total Production	73,807.4	49,016.9	50.6%
Western Canada On Farm & Primary Elevator Carry Forward Stock	3,820.8	7,542.1	-49.3%
<b>Total Grain Supply</b>	<b>77,628.2</b>	<b>56,559.0</b>	<b>37.3%</b>

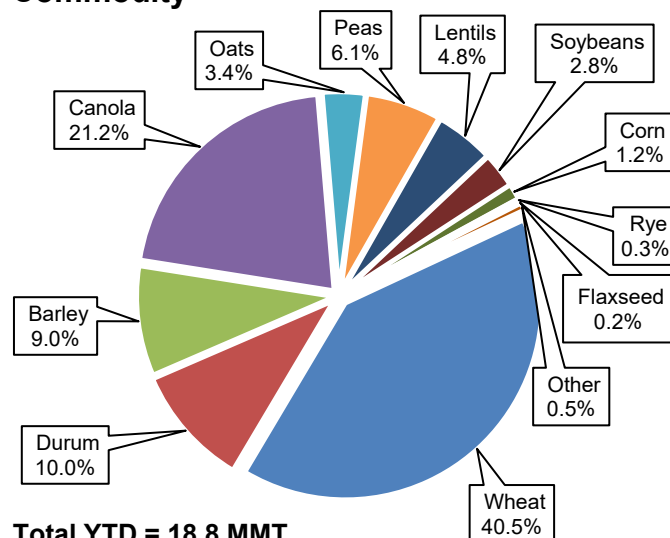
## Traffic and Movement

November producer deliveries continued the strong pace seen the previous month, averaging just over 1.2 MMT per week. Average weekly primary-elevator stock levels fell to 3.8 MMT from 4.1 MMT in October, with good space in the elevator system throughout the month.

Table M-3	NOV 2022	2022-23 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	1,159.6	3,395.3	10.5%
Saskatchewan	3,190.1	9,713.9	48.1%
Alberta	1,680.5	5,607.2	36.3%
British Columbia	43.3	132.9	11.8%
<b>Total</b>	<b>6,073.5</b>	<b>18,849.3</b>	<b>35.9%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	4,732.9	16,305.1	38.7%
Shipments to Eastern Canada	192.8	787.0	-3.4%
Shipments to US & Mexico	746.7	2,618.6	11.5%
Shipments Western Domestic	88.8	290.8	-6.7%
<b>Total</b>	<b>5,761.1</b>	<b>20,001.5</b>	<b>31.3%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	37,309	107,129	43.6%
Prince Rupert	6,419	15,712	81.5%
Churchill	0.0	0.0	n/a
Thunder Bay	10,435	31,501	8.6%
<b>Total</b>	<b>54,163</b>	<b>154,342</b>	<b>37.5%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	3,412.0	9,665.0	36.4%
Prince Rupert	583.4	1,408.1	90.1%
Churchill	0.0	0.0	n/a
Thunder Bay	913.3	2,847.8	5.6%
<b>Total</b>	<b>4,908.7</b>	<b>13,920.9</b>	<b>32.3%</b>



## Primary Elevator Shipments by Commodity

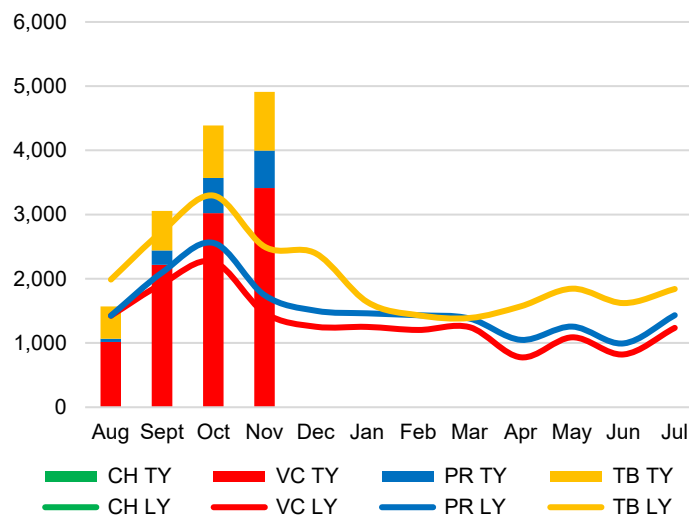


**Total YTD = 18.8 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators grew in the first four months of the crop year, registering 35.9% greater than in same period the previous year. Wheat, including durum, and canola continue to constitute the largest proportion of the movement at 71.7%. Movement of peas and lentils contributed 10.9% of the total.

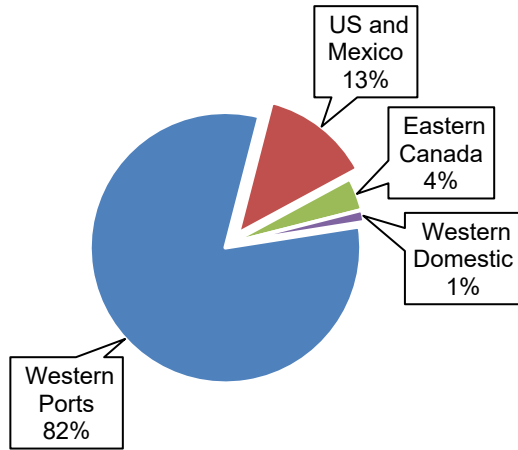
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk grain shipments from western ports have made a strong rebound in the first four months of the 2022-23 crop year. November shipments were 96.5% higher than in November 2021 with a year-to-date increase of 32.3%. November 2021 shipments were upended by the torrential rains that severely damaged transportation infrastructure in the BC lower mainland. Vancouver was up 36.4%, while Prince Rupert surged to a 90.1% gain. Thunder Bay shipments recorded a more modest year-over-year increase of 5.6%.

## Western Canadian Grain Destinations

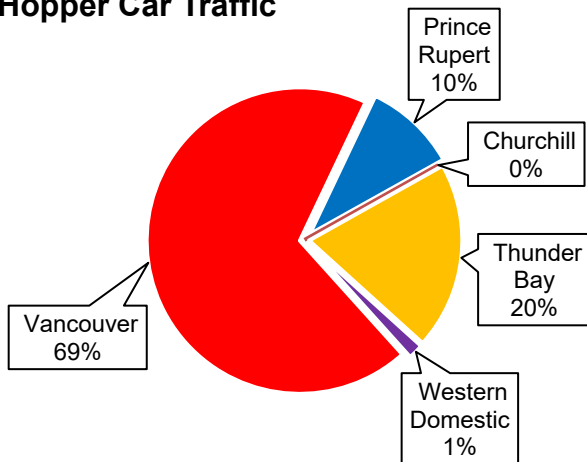


Total YTD = 20.0 MMT

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

Railway grain shipments from Western Canada totaled just over 20.0 MMT in the first four months of the 2022-23 crop year, a 31.3% increase from the 15.2 MMT handled a year earlier. The majority, about 16.3 MMT, was directed to Western Canadian ports in support of export sales. This represented a 38.7% increase over what had been shipped in the same period the previous year, with the increase partially offset by a 6.7% decrease in Western Domestic traffic. A 3.4% decline was noted on movements into Eastern Canada, while shipments to the US and Mexico rose by 11.5%.

## Western Canadian Destined Hopper Car Traffic



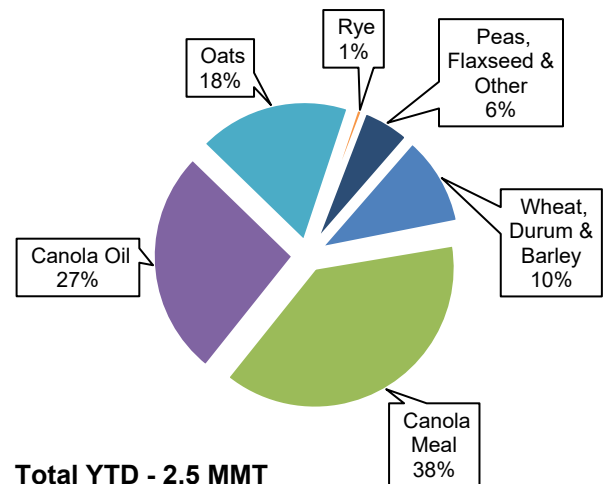
Total YTD - 16.3 MMT

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 2022-23 crop year this amounted to nearly 16.3 MMT, up 38.8% from the previous year. Sixty-nine 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 rose by 47.8%. The west-coast increase was broadened by a 71.2% gain in Prince Rupert volumes as well, but tempered by a 7.4% decline in Western Domestic traffic. Shipments to Thunder Bay also rose, albeit by a lesser 9.8%, while the port of Churchill reported no export grain shipments at all.

## US Destined Grain by Commodity

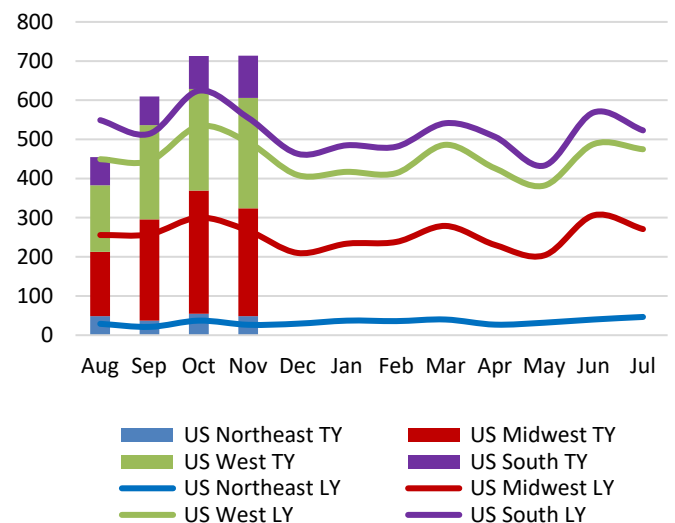


Total YTD - 2.5 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached almost 2.5 MMT in the first four months of the 2022-23 crop year, up 11.1% 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 declined marginally in November, averaging 3.8 MMT with continued steady producer deliveries of the 2022 harvest. Overall space in the country system was good. Country stocks utilized 70% of the working capacity of the network. By province, stocks ranged from 66% of working capacity in Saskatchewan to 70% and 75%, in Manitoba and Alberta respectively, and 84% in British Columbia.

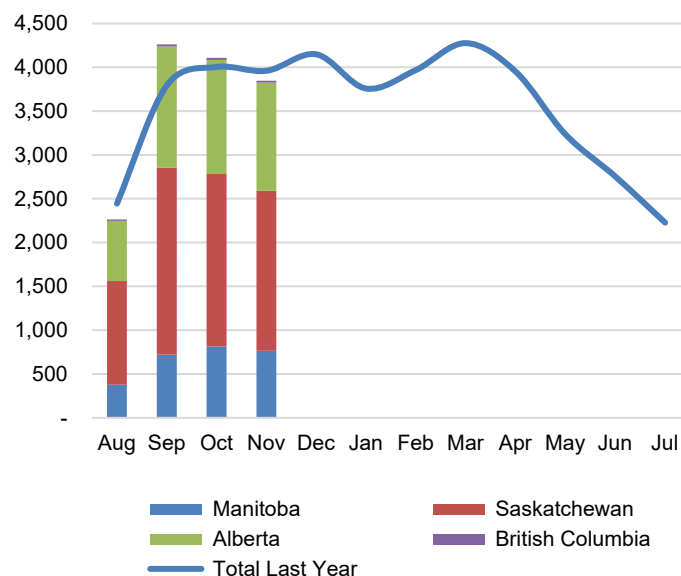
The average days-in-store in the primary-elevator system for the first four months of the crop year declined from the same period last year, falling 24.1% to 23.1 days.

Table M-4	NOV 2022	2022-23 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	3,846.8	3,556.8	-0.2%
Average Days in Store	21.5	23.1	-24.1%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	12.2	13.5	-13.9%
Cycle Time to Eastern Canada	21.2	26.6	5.1%
Cycle Time to US	21.7	23.5	-1.5%
Loaded Transit to Western Ports	5.7	5.3	-8.1%
Loaded Transit to Eastern Canada	10.4	12.5	1.8%
Loaded Transit to US	9.7	9.4	-4.1%
Rail Fleet in Grain Service	21,885	17,820	10.5%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,397.4	1,108.8	-6.7%
Average Days in Store	9.9	10.2	-26.1%
Port Unloads (hopper cars)	54,163	154,342	37.5%
Terminal Out-of-Car Time	10.4%	11.1%	-38.0%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	10.5	8.4	5.4%

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



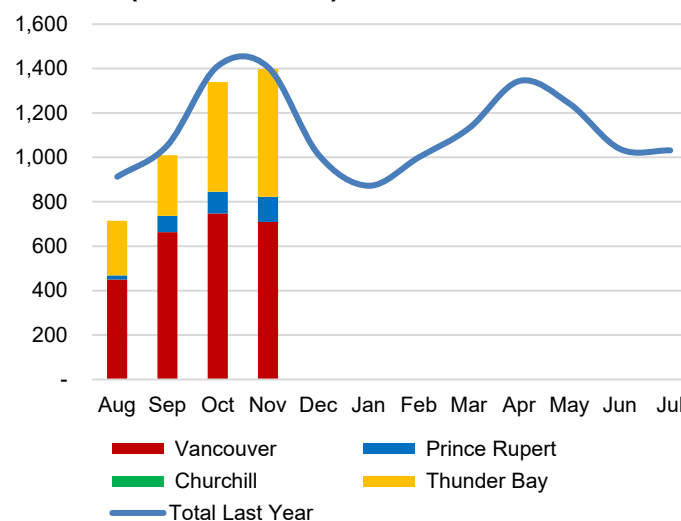
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.2 MMT in store. They grew to average 4.3 MMT in September before retreating to 3.8 MMT in November. Wheat, including durum, and canola, comprise 66% of the total stock. At 20% of the stock, barley, oats and peas made up much of the balance.

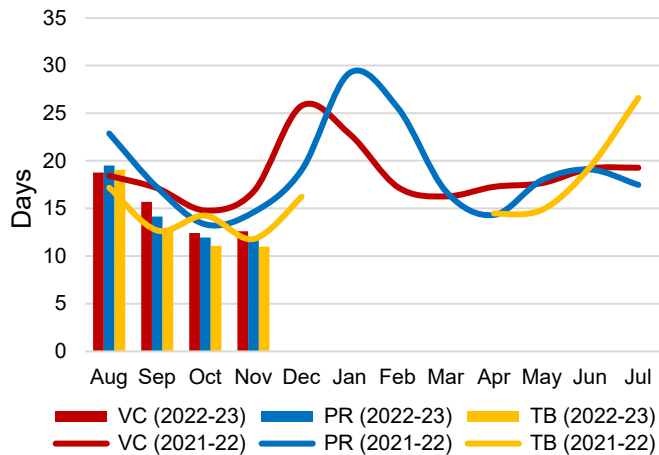
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.4 MMT in November, a modest increase from the previous month as supply flowed into port to meet steady shipping demand. While building at Prince Rupert and Thunder Bay, stocks dropped marginally at Vancouver. Wheat, including durum, and canola, comprise just under 79% of the total stock. In November, western ports utilized just 73% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

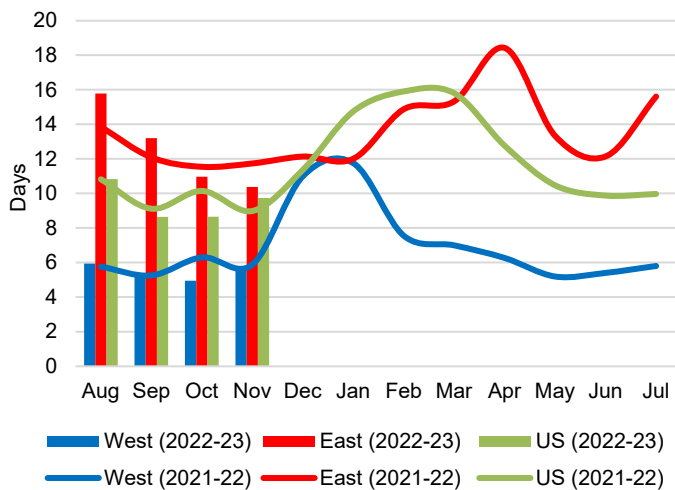


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 13.5 days in the first four months of the 2022-23 crop year, down 13.9% from the 15.6-day average reported a year earlier. This was largely the result of decreases in the Vancouver and Prince Rupert corridors, with car-cycle averages falling by 15.5% and 18.6% respectively. The Thunder Bay average fell by a lesser 9.9%.

A 1.5% decrease was noted in the cycle for US movements, which fell to an average of 23.5 days from 23.9 days the previous year. Conversely, the car cycle into Eastern Canada rose by 5.1%, to an average of 26.6 days from 25.3 days a year earlier.

## Average Loaded Transit Times (days)

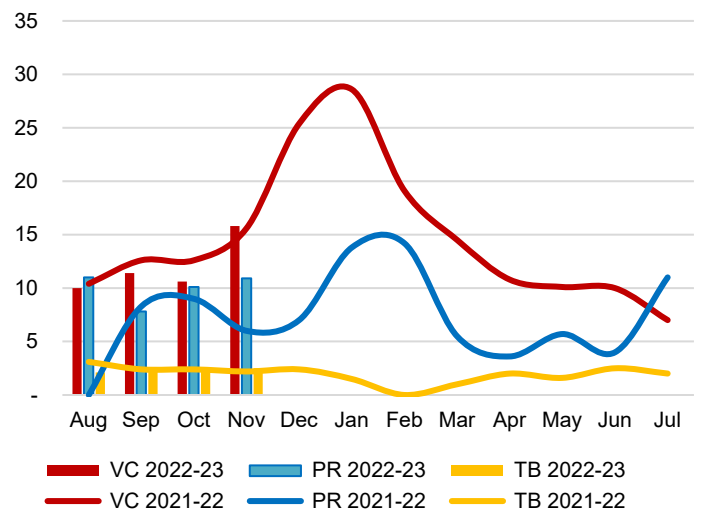


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 5.3 days in the first four months of the 2022-23 crop year, down 8.1% from the 5.8-day average posted a year earlier. This was primarily driven by a 7.3% decrease in the Vancouver-corridor average but supported by decreases in the Prince Rupert and Thunder Bay, which fell by 14.9% and 9.8% respectively. The average into Eastern Canada rose by a modest 1.8%, to 12.5

days from 12.3 days a year earlier. The average on US-bound traffic fell by 4.1%, to 9.4 days from 9.8 days.

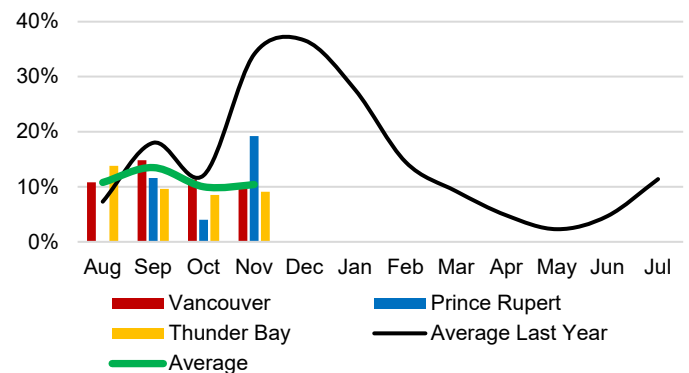
## Average Days in Port per Vessel



GMP Data Table 5D-1

In November, the overall-average time vessels were in port waiting and loading grain was 10.5 days, 25.5% more than was the case in November 2021. The average at Vancouver and Prince Rupert grew from that seen in October. The average at Thunder Bay held constant with the previous month. In November, the average days in port stood at 15.8 for Vancouver, 10.9 for Prince Rupert and 2.5 for Thunder Bay.

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

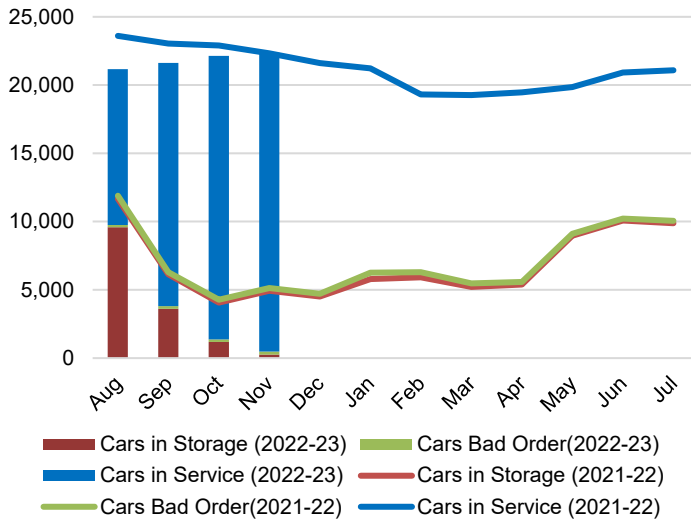


GMP Data Table 5C-5

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 climbed to 10.4% in November, up from 10.0% in October. Terminal out-of-car time decreased to 9.6% at Vancouver while rising to 19.2% at Prince Rupert and to 9.1% at Thunder Bay.

## Railway Grain Fleet Size and Utilization

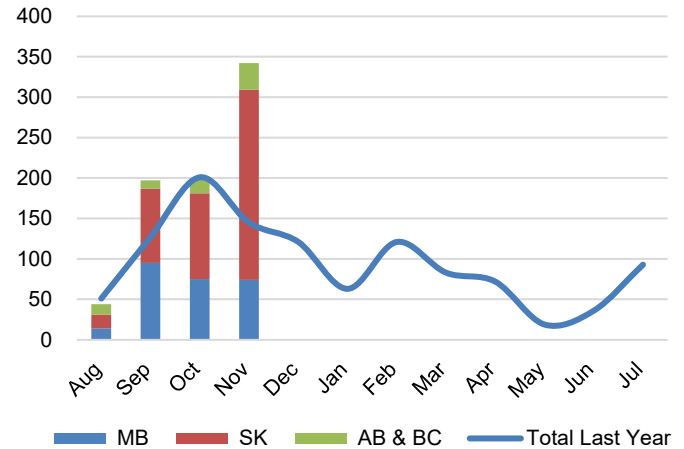


GMP Data Table 3B-2

During times of heavy demand, nearly the entire hopper-car fleet is placed into 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 2021-22 crop year as the weekly number of cars in service declining to a low of 10,693 in June 2022, with roughly half the fleet then having been placed in storage. A modest increase in the serviceable-car count is seen by August 2022, rising to 11,413 followed by a jump to 21,885 by November. It is worth noting that in November, 98% of the overall fleet was in service to address the heavy shipping demands for western grain, with a minimal number of cars being reported in either storage or bad order status.

## Producer Cars

### Producer Cars Scheduled by Province



GMP Data Table 6B-2

Producer car shipments scheduled for November 2022 were 135.9% more than those in November a year ago. The previous crop year saw oats shipments comprising 54% of overall producer cars scheduled, while the first four months of the 2022-23 crop year registered oats marginally less, at only 50% of the overall producer-car number. Wheat and durum constitute a lesser 38% of the year-to-date 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