

## GMP Dashboard

Table M-1	MAR 2021	APR 2021	2020-21 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	42.2	39.7	42.1	-6.2%
Average Days In Store – Country	28.0	23.3	25.5	-2.0%
Loaded Transit Time	6.9	6.4	7.1	-7.1%
Average Days In Store – Terminal	7.3	10.0	9.5	-15.9%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	5,685.0	4,734.7	43,584.5	15.1%
Railway Shipments (all Western Canada traffic)	5,820.2	5,720.3	49,593.2	16.1%
Western Port Terminal Shipments	4,023.0	3,982.7	34,898.4	26.3%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	12,158	11,667	12,535	10.5%
Total Western Port Car Cycle (days)	14.9	13.7	15.0	-10.7%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	43,126	42,495	367,745	23.2%
Vessel Time in Port (days)	13.1	7.2	11.7	-10.9%

*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

Railway grain shipments from Western Canada fell by 1.7% in April 2021, to 5.7 MMT from March's 5.8 MMT. Despite this downturn, monthly volumes have proven consistently greater than last year, with total shipments for the first nine months of the 2020-21 crop year having risen by 16.1%, to a record 49.6 MMT. Port shipments for April totaled 4.0 MMT, a 1.0% decrease from March volumes as steady demand was met by good system performance resulting in an easing of the port-vessel-lineup count. Notwithstanding the marginal month-over-month slowdown, year-to-date bulk shipments from western ports stand 26.3% higher than the previous year. Accompanying the decrease in shipments, is a 7.2-day average in the amount of time vessels spent in port in April, with the first-three-quarter average measuring 11.7 days.

## Highlights for April 2021 and Third Quarter 2020-21 CY

### Traffic and Movement (page 2)

- Primary-elevator shipments were 43.6 MMT in the first three quarters of the 2020-21 crop year, 15.1% more than in the previous year.
- Western Canadian rail shipments (from all primary/process elevators and producer-car sites) totaled almost 49.6 MMT in the first nine months of the 2020-21 crop year, 16.1% above the previous crop year's 42.7 MMT.
- Bulk shipments from Western Canadian ports totaled 34.9 MMT in the first three quarters of the 2020-21 crop year, up 26.3% from last crop year.

### System Efficiency and Performance (page 4)

- Average weekly primary-elevator stocks increased by 14.5% from last year-to-date. The average days-in-store declined 2.0%.
- Average weekly port-terminal stocks increased 9.1% from the same period last year, while average days-in-store fell 15.9%.
- Railcar cycle times fell for a third consecutive month in April, with the preliminary average for Western Canadian movements decreasing by 8.2%, to 13.7 days from 14.9 days in March. The year-to-date average also stands 10.7% lower, falling to 15.0 days from 16.8 days a year earlier.
- The first-three-quarter 2020-21 crop-year average for vessel time in port is 11.7 days, a 10.9% decrease from that observed in the previous crop year.
- Port-terminal out-of-car time fell to 13.1% at Vancouver in April from 19.2% in March, and to 1.6% at Prince Rupert from 11.8%. At Thunder Bay the out-of-car time fell to 2.8% in April from 4.0% the previous month.

### Commercial Relations (page 6)

- Average primary-elevation charges increased 0.6% in the first three quarters of the 2020-21 crop year.
- Both CN and CP reduced their single-car freight rates at the beginning of August 2020, CN by about 3.8% and CP by a lesser 3.0%. CN advanced increases in each of the three succeeding months, with decreases following in March and April, producing year-to-date reductions of 1.9% in the Vancouver and Prince Rupert corridors, and 7.7% in the Thunder Bay corridor. In comparison, CP maintained its rates on traffic destined to Vancouver and Thunder Bay through the next eight months, preserving net reductions of about 3.0%.
- Average terminal-elevation charges increased 6.2% in the first three quarters of the 2020-21 crop year.

### Infrastructure (page 6)

- The country-elevator network increased to 409 facilities from 402 in the first nine months of the crop year. Storage capacity rose by 2.9% to a record 9.1 MMT. Much of the gain was tied to the licencing of several new loop-track elevators, which now total 30.
- No changes were recorded against the railway network in the first nine months of the 2020-21 crop year.
- The second quarter's licencing of the Fraser Grain Terminal lifted the total number of terminal elevator facilities to 18, with almost 2.8 MMT in storage capacity.

## Production and Supply

Statistics Canada's November survey for 2020 field-crop production in Western Canada stands at 77.7 MMT, a 3.5% increase over 2019's 75.1 MMT harvest. This ranks as the largest crop on record, surpassing 2013's 77.0 MMT. The survey of producers' harvested acreage and yield data was conducted between October 9 and November 15, 2020. It resulted in an increase in the overall production estimate of 1.4 MMT from the model-based estimate published in September.

When coupled with July's 8.1 MMT of carry-forward stocks, some 20.8% less than in 2019, the overall grain supply is estimated at 85.8 MMT. Establishing a new record, it stands some 0.6% above the previous record reached just last year when the total supply was 85.3 MMT.

Table M-2:	2020	2019	Var. from Last Yr.
<b>Production &amp; Carry Over (000's tonnes)</b>			
<b>Western Canada Total Production</b>	77,745.1	75,090.3	3.5%
<b>Western Canada On Farm &amp; Primary Elevator Carry Forward Stock</b>	8,074.6	10,196.2	-20.8%
<b>Total Grain Supply</b>	<b>85,819.7</b>	<b>85,286.5</b>	<b>0.6%</b>

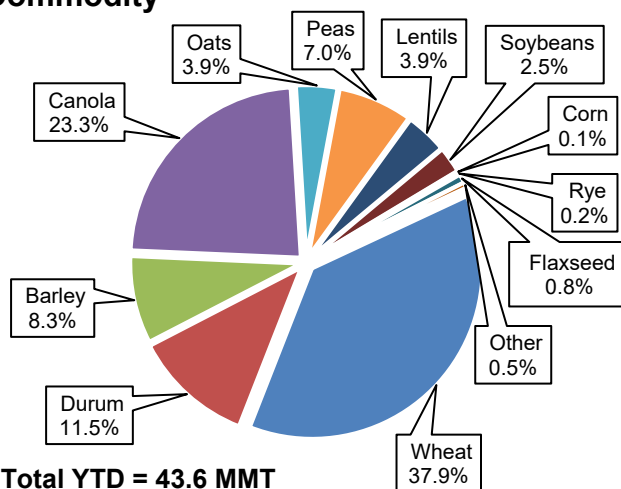
## Traffic and Movement

Continuing the trend set throughout the crop year to date, April deliveries averaged just under 1.0 MMT per week. Average weekly primary-elevator stock levels declined to 4.0 MMT, with good space available in facilities across the prairies.

Table M-3	APR 2021	2020-21 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	824.6	7,609.1	20.5%
Saskatchewan	2,440.1	23,786.0	14.5%
Alberta	1,461.3	11,997.1	14.7%
British Columbia	8.7	192.3	-37.7%
<b>Total</b>	<b>4,734.7</b>	<b>43,584.5</b>	<b>15.1%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	4,816.5	40,223.2	21.4%
Shipments to Eastern Canada	247.5	3,425.9	8.8%
Shipments to US & Mexico	556.1	5,297.3	-6.4%
Shipments Western Domestic	100.1	646.7	-19.6%
<b>Total</b>	<b>5,720.3</b>	<b>49,593.2</b>	<b>16.1%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	28,983	255,026	34.0%
Prince Rupert	5,353	46,417	9.0%
Churchill	0	1,063	-27.9%
Thunder Bay	8,159	65,239	1.5%
<b>Total</b>	<b>42,495</b>	<b>367,745</b>	<b>23.2%</b>

Table M-3	APR 2021	2020-21 YTD	Var. from Last YTD
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	2,642.0	24,443.4	37.2%
Prince Rupert	479.5	4,276.6	11.0%
Churchill	0.0	95.7	-30.3%
Thunder Bay	861.2	6,082.7	4.7%
<b>Total</b>	<b>3,982.7</b>	<b>34,898.4</b>	<b>26.3%</b>

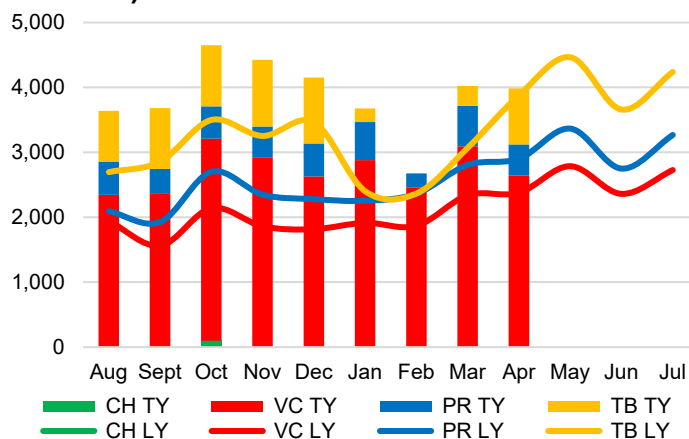
## Primary Elevator Shipments by Commodity



GMP Data Table 2A-1

Grain shipments from primary elevators surged in the first three quarters of the 2020-21 crop year, registering 15.1% more than in the same period the previous year. Wheat, including durum, and canola continue to constitute the largest proportion of the movement at 72.7%. Movement of peas and lentils contributed 10.9% of the balance.

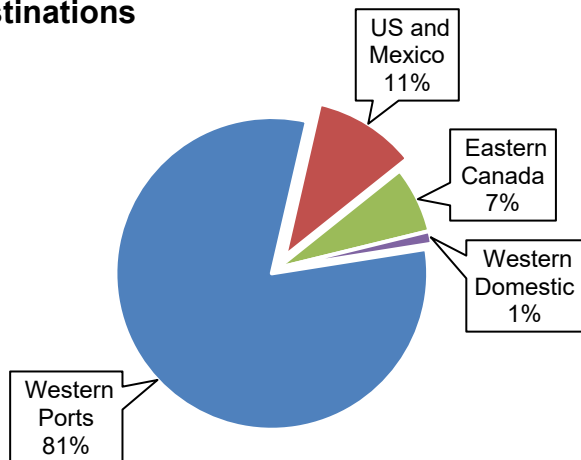
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments from western ports grew in the first three quarters of the 2020-21 crop year, registering a 26.3% increase on a year-over-year basis. Vancouver and Prince Rupert recorded the largest increases at 37.2% and 11.0% respectively. Thunder Bay registered a lesser 4.7% gain.

## Western Canadian Grain Destinations

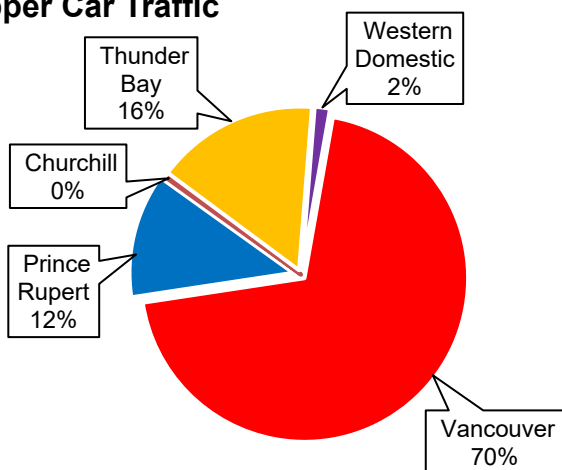


Total YTD = 49.6 MMT

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

Owing in large measure to full operation of the new G3 Terminal in Vancouver, railway grain shipments from Western Canada rose to a record 49.6 MMT in the first nine months of the 2020-21 crop year, 16.1% more than the 42.7 MMT handled in the same period a year earlier. The majority, about 40.2 MMT, or 81%, was directed to Western Canadian ports in support of offshore sales; 21.4% over what had been handled a year earlier. This was supported by an 8.8% increase in shipments to Eastern Canada. Running counter to these gains were reductions in movements to Western Domestic destinations, which fell by 19.6%, and a combined 6.4% for shipments into the US and Mexico.

## Western Canadian Destined Hopper Car Traffic



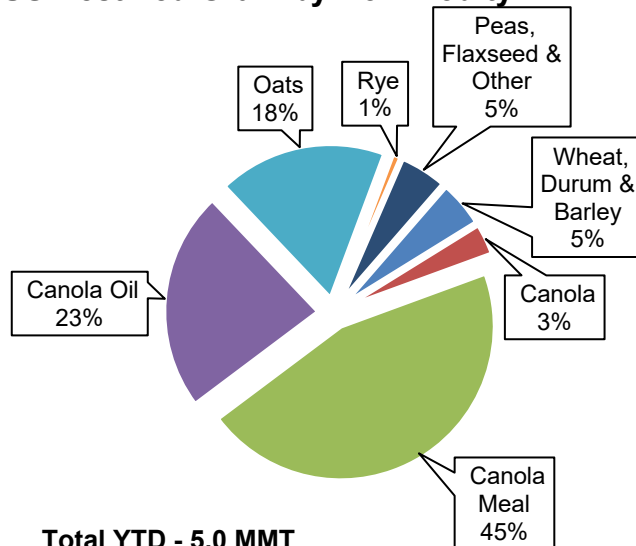
Total YTD - 39.1 MMT

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 nine months of the 2020-21 crop year this amounted to almost 39.1 MMT, up 21.2% from a year earlier. Seventy percent of these hopper cars were destined to Vancouver, which remains the port of choice for exporting grain, given its ready access to Asia-Pacific

markets and the concentration of export terminal facilities. A 33.1% increase in hopper-car shipments to Vancouver was largely responsible for shaping the broader growth in traffic. This was supported by gains in shipments to Prince Rupert and Thunder Bay, which rose by 4.0% and 0.5% respectively. Running counter to these increases, however, were declines in shipments to Churchill and Western Domestic destinations, which fell by 20.9% and 19.2% respectively.

## US Destined Grain by Commodity

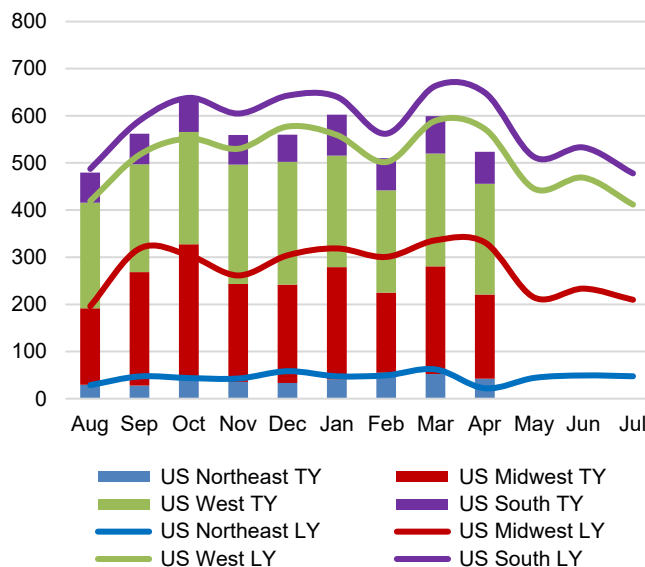


Total YTD - 5.0 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached just over 5.0 MMT in the first nine months of the 2020-21 crop year, down 8.1% from that handled a year earlier. About 80% of these shipments are directed into the Midwestern and Western US, with canola and canola products dominating.

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



GMP Data Table 2B-18



## System Efficiency and Performance

Primary-elevator stocks grew, with some fluctuation, throughout the first three quarters of the crop year, climbing from 2.7 MMT in August to 4.0 MMT in April. The overall first-half average is 4.1 MMT. Space in the country system has been good for most of the crop-year-to-date. Country stocks utilized 76% of the working capacity of the network in April. By province, stocks ranged from 71% in Manitoba to 77% in both Saskatchewan and Alberta and 100% in British Columbia.

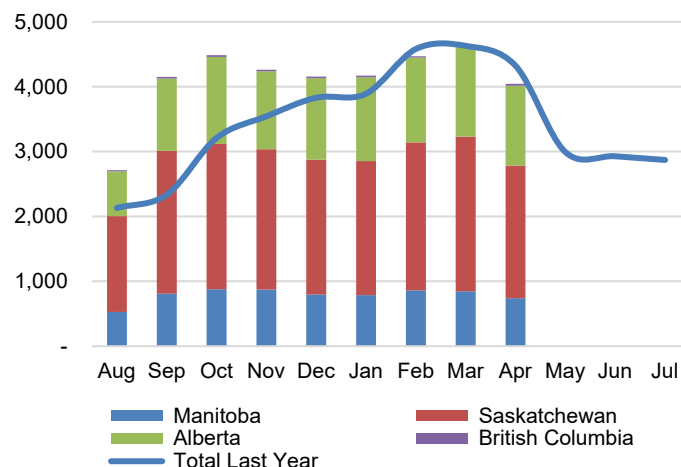
The average days-in-store in the primary-elevator system for the first three quarters declined from last year, falling 2.0% to 25.5 days.

Table M-4	APR 2021	2020-21 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	4,043.3	4,136.1	14.5%
Average Days in Store	23.3	25.5	-2.0%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	13.7	15.0	-10.7%
Cycle Time to Eastern Canada	19.4	21.4	-5.6%
Cycle Time to US	24.0	25.5	-0.9%
Loaded Transit to Western Ports	6.4	7.1	-7.1%
Loaded Transit to Eastern Canada	9.6	10.7	-0.2%
Loaded Transit to US	9.4	10.8	9.3%
Rail Fleet in Grain Service	22,039	23,277	4.6%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,413.1	1,320.5	9.1%
Average Days in Store	10.0	9.5	-15.9%
Port Unloads (hopper cars)	42,495	367,745	23.2%
Terminal Out-of-Car Time	9.6%	15.7%	42.7%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	7.2	11.7	-10.9%

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



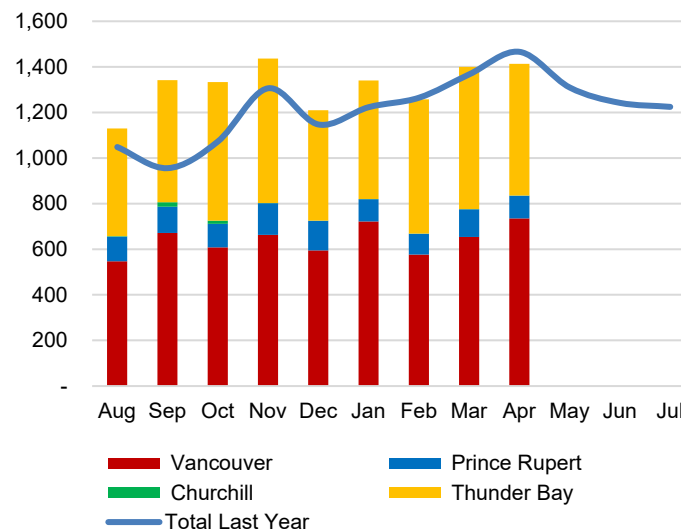
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.9 MMT in store. In August, they pulled back further to average 2.7 MMT before reversing direction and rising to average 4.6 MMT in March. In April, they once again pulled back to average 4.0 MMT. Wheat, including durum, and canola comprise 70% of the total stock. At 19% of the stock, barley, oats and peas made up much of the balance.

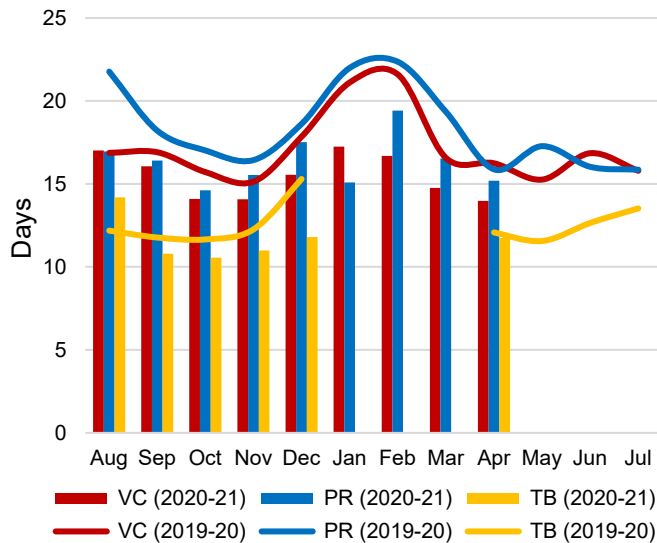
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.3 MMT in the first three quarters of the 2020-21 crop year, 9.1% greater than the previous year. April stocks built by just 1.0% from those one month earlier in March. Terminal stocks posted a 3.6% decline from the all-ports levels seen in April 2020. Wheat, including durum, and canola comprise over 77% of the total stock. In April, western ports utilized 73% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

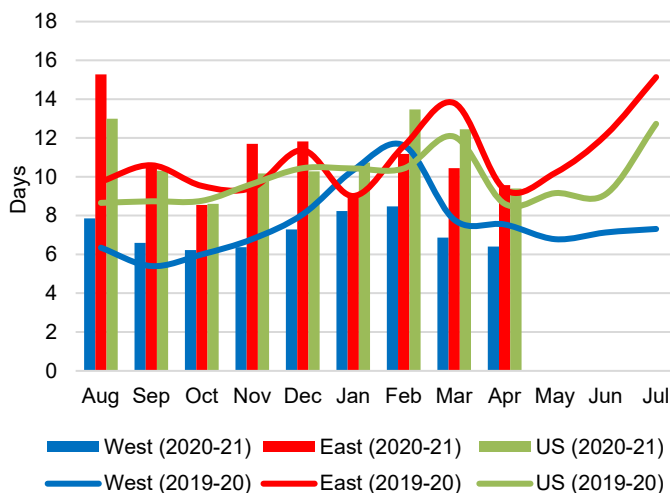


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 15.0 days in the first nine months of the 2020-21 crop year, down 10.7% from the corresponding 16.8-day average posted in the previous crop year. This result was shaped by decreases in all three corridors, with the Vancouver average falling 11.6%, the Prince Rupert average 12.9%, and the Thunder Bay average 7.8%.

The average car cycle on movements into Eastern Canada and the United States also declined. The average on Eastern Canadian shipments fell by 5.6%, to 21.4 days from 22.7 days a year earlier. The car cycle for movements into the United States declined by 0.9%, to an average of 25.5 days from the 25.7-day average posted in the same period of the previous crop year.

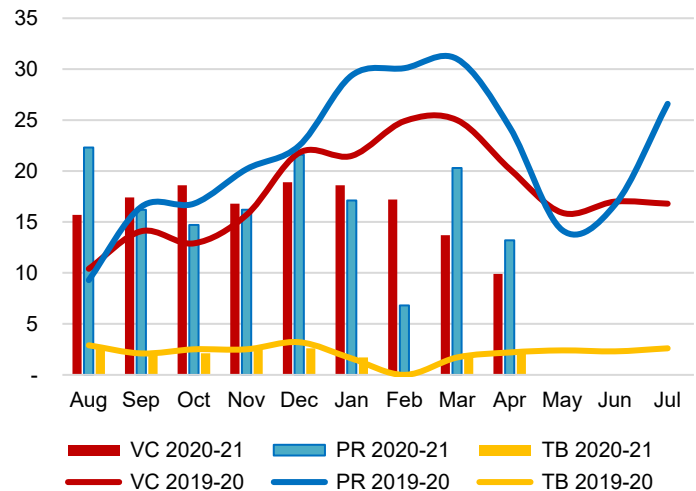
## Average Loaded Transit Times (days)



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

The loaded transit time for traffic destined to Western Canadian ports averaged 7.1 days in the first nine months of the 2020-21 crop year, down 7.1% from the 7.6-day average posted a year earlier. This was the product of decreases in all three corridors, with the Vancouver average falling 8.0%, the Prince Rupert average 10.9%, and the Thunder Bay average 4.8%. A 0.2% decrease was observed on movements into Eastern Canada, with average loaded transit time remaining effectively unchanged from the 10.7 days posted twelve months before. Conversely, the average on movements into the United States increased by 9.3%, to 10.8 days from 9.9 days.

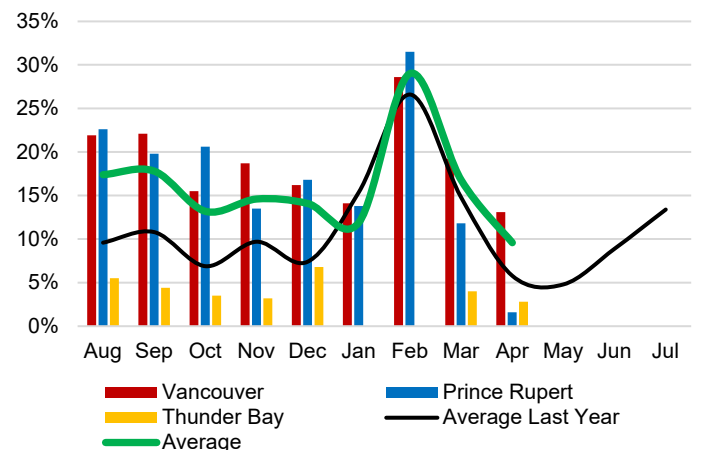
## Average Days in Port per Vessel



GMP Data Table 5D-1

In April, the overall average time vessels were in port waiting and loading grain fell to 7.2 days from 13.1 days the month before. The crop-year average stands at 11.7 days, 10.9% below that registered in the previous crop year. Consistent with the year-over-year decrease, all western ports experienced declines of varying degrees from March levels. For the month of April, days in port stood at 9.9 for Vancouver, 13.2 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 fell to 9.6% in April, with a crop-year-to-date average of 15.7%. Terminal out-of-car time at Vancouver fell to 13.1% in April, to 1.6% at Prince Rupert and to 2.8% at Thunder Bay.

## Commercial Relations

<i>Table M-5</i> Rates: \$CDN per tonne	Q3 2020-21	Index (1999=100)	% Change YTD
<b>Avg. Primary Elevation</b>	16.70	139.2	0.6%
<b>Rail to Vancouver</b>			
CN	55.37	150.9	-1.9%
CP	58.58	159.1	-3.2%
<b>Rail to Pr. Rupert</b>			
CN	55.37	133.3	-1.9%
<b>Rail to Thunder Bay</b>			
CN	50.97	157.7	-7.7%
CP	50.49	167.8	-2.9%
<b>Average Terminal Elevation</b>	15.29	167.7	6.2%

*Note: Commercial rates are measured on a quarterly basis, the above table refers to rates at the close of the first three quarters of the 2020-21 crop year (as at 30 April 2021). Railway freight rates reflect average published single-car rates, and do not include multi-car incentives (\$8/tonne for 100+ car blocks).*

Both CN and CP initially reduced their single-car freight rates at the beginning of the 2020-21 crop year. In the case of CN, this amounted to an across-the-board reduction of about 3.8%. However, the reduction was reversed with consecutive increases of up to 5.0% in September, 5.0% in October, and 1.9% November. The prevailing rates remained unchanged until March 2021 when CN reduced its rates in the Thunder Bay corridor by 13.0%, followed by a 9.1% cut in its West Coast rates in April. By the close of the third quarter CN had effectively reduced its rates on movements to Vancouver and Prince Rupert by 1.9%, and Thunder Bay by 7.7%. In comparison, CP's applied an initial reduction of 3.2% on its rates to Vancouver at the beginning of August, with a marginally lesser cut of 2.9% on those to Thunder Bay. Unlike CN, however, CP maintained these rates unchanged through the end of April 2021.

## Commercial Developments

**Canola crushing capacity to expand:** In the span of less than five weeks, three of Canada's largest grain companies announced separate projects that would increase domestic canola crushing capacity by nearly 40% over the next three years. The first of these came in late March when Richardson International unveiled its plan to effectively double the processing capacity of its existing plant in Yorkton SK to 2.2 million tonnes annually. This was followed nearly a month later with Cargill stating that it intended to

modernize both of its existing facilities as well as invest in a new Regina-based facility capable of processing one million tonnes of canola seed per year. A few days later Viterra revealed that it would be building the world's largest canola crush facility, also to be situated in Regina, capable of processing 2.5 million tonnes of seed annually. In addition to the sustained growth for cooking oils around the globe, the need for further capacity is being spurred by the demands for canola meal along with the increasing needs of the biodiesel sector. One potential domestic customer might well be Federated Co-operatives Limited, which has itself been exploring the potential for construction of a one-billion-litre biodiesel plant in the Regina area.

**Longshoremen strike Port of Montreal:** On 13 April 2021, Montreal longshoremen began refusing to work overtime and weekends, restricting the amount of cargo that could be processed by the port. The work slowdown was part of an ongoing labour dispute dating back to a strike in August 2020 that had forced at least 21 ships to divert to other ports. Although federal mediation efforts continued, the situation soon escalated, with the union initiating a general strike by some 1,100 of its members on 26 April 2021. Although a work stoppage did not affect bulk grain movements through the port, it had already begun to impede containerized grain shipments. Widespread concern over the economic impact of the strike while the country still grappled with the COVID-19 pandemic, led the federal government to pass back-to-work legislation to bring the strike to an end.

**Churchill ownership change:** On 11 March 2021, the Arctic Gateway Group (AGG), which has owned and operated the Port of Churchill, the Hudson Bay Railway, the Churchill Marine Tank Farm, and associated assets since 2018, announced that the company would be transitioning from a 50% interest by OneNorth (a consortium of Indigenous and northern communities) to its outright ownership. The announcement signalled a relinquishing of the 50% stake jointly held by AGT Food & Ingredients and Fairfax Financial Holdings since the formation of the original partnership nearly three years earlier. AGG oversaw the restoration of the crucial railway service that had been suspended by the previous owner, OmniTRAX, because of severe flooding and washouts in 2017.

## Infrastructure

Apart from the railways' car fleet, GMP measures relating to infrastructure are reported on a quarterly basis. The first nine months of the 2020-21 crop year brought some notable changes to the GHTS's physical infrastructure.

The country-elevator network grew by seven facilities, increasing to 409 from 402. This gain was the product of various licencing changes, including the addition of three new Alberta-based loop-track facilities in the second quarter along with the retrofitting of the Viterra facility at Balgonie SK with a loop-track in the third, which lifted the total number of such facilities to 30. All of this added another 256,700 tonnes of new storage capacity to the system, which reached a record 9.1 MMT in April 2021.

There were no changes recorded against the railway network in the first nine months of the crop year. Total mileage remained unchanged at 17,265.7 route-miles, with 84.5% being operated by CN and CP.

The terminal elevator network expanded with the licencing of the Fraser Grain Terminal in the second quarter, lifting the total number of facilities to 18 with almost 2.8 MMT in storage capacity.

Table M-6	Q3 2020-21	Index (1999=100)	% Change YTD
<b>Country Elevator</b>			
Primary and Process Elevators (Count)	409	40.7	1.7%
Storage Capacity (000's tonnes)	9,132.1	130.0	2.9%
<b>Railway</b>			
Route Miles - Major Carriers	14,596.1	98.4	0.0%
Route Miles - Shortline Carriers	2,669.6	57.5	0.0%
Route Miles - Total	17,265.7	88.7	0.0%
Average Weekly Total Hopper Car Fleet Size*	25,826	n/a	-0.6%
<b>Terminal Elevator</b>			
Terminal Facilities (Count)	18	128.6	5.9%
Storage Capacity (000's tonnes)	2,767.5	108.2	2.7%

\* Hopper Car Fleet Size represents all cars in all statuses for the first three quarters of the 2020-21 crop year.

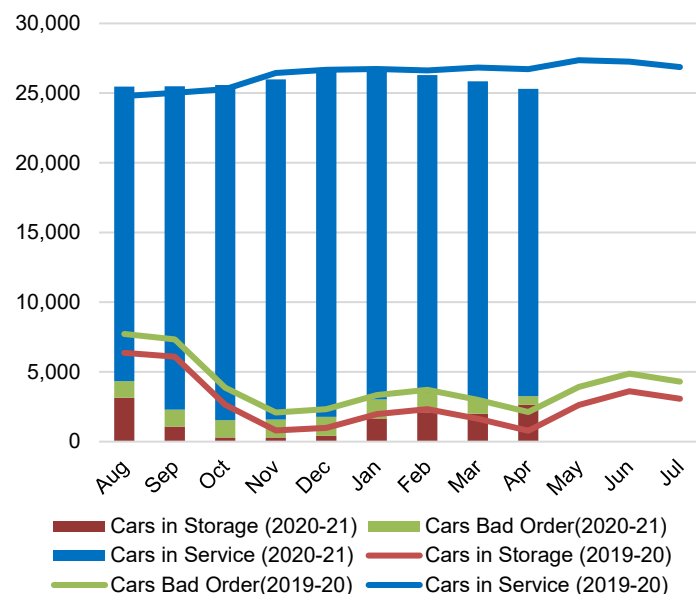
During times of heavy demand for grain hopper cars, nearly all of the hopper-car fleet is placed in service. It is normal practice for railways to move cars into storage as traffic volumes decrease in the latter months of the crop year. This was the case in the 2019-



20 crop year as in July 2020, a weekly average of 22,562 cars, representing 84% of the fleet, was in active service. Cars in

service fell further in August, to an average of 21,125 per week before reversing directions and climbing to 24,896 in December. By April, they had again retreated to 22,039 cars. The average cars in service for the first three quarters of the crop year represent 87% of the total fleet. The balance, comprising 13% of the rail cars, was in storage or repair status (bad order).

## Railway Grain Fleet Size and Utilization



GMP Data Table 3B-2

## Producer Cars

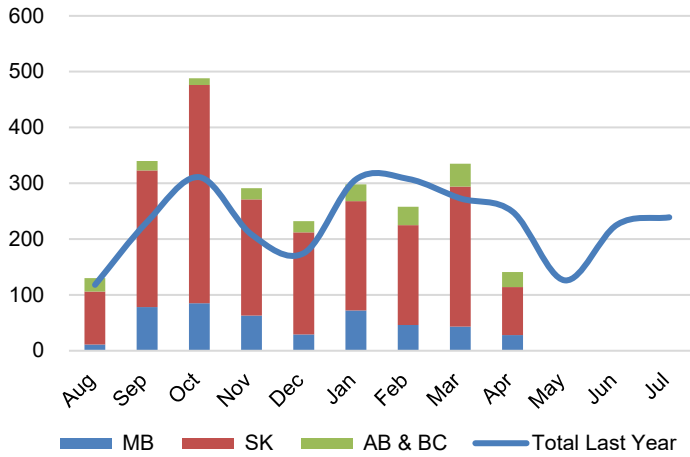
No change was registered in the number of producer-car loading sites in the first three quarters of the 2020-21 crop year. The total number of available producer-car loading locations at the end of April stands at 272.

Table M-7	Q3 2020-21	Index (1999=100)	% Change YTD
<b>Producer Car Loading Sites</b>			
Class 1 Carriers	142	22.2	0.0%
Shortline Carriers	130	200.0	0.0%
<b>All Carriers</b>	<b>272</b>	<b>38.3</b>	<b>0.0%</b>

Table M-8	Q3 2020-21	2020-21 YTD	Var. from Last YTD
<b>Producer Cars Scheduled</b>			
Manitoba	117	455	51.2%
Saskatchewan	516	1,834	19.4%
Alberta & B.C.	101	224	-34.7%
<b>Total</b>	<b>734</b>	<b>2,513</b>	<b>15.3%</b>

Although producer cars scheduled for April 2021 were 43.4% less than in April 2020, the crop-year-to-date number marks an upturn of 15.3% from the previous year. The 2020-21 crop year continues the trend seen late in the last crop year when year-over-year increases were registered for the first time since the 2013-14 crop year.

## Producer Cars Scheduled by Province

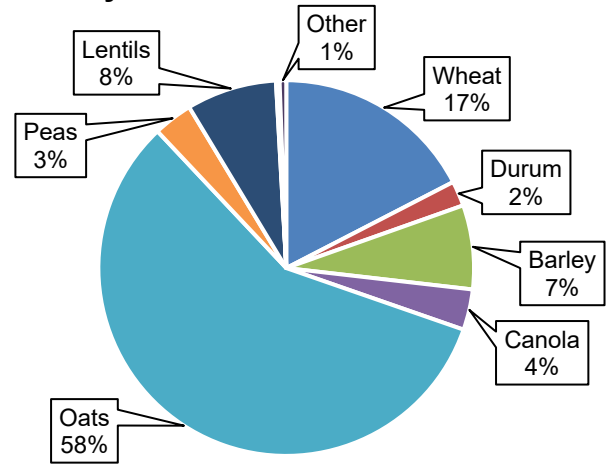


GMP Data Table 6B-2

Recent years has seen the proportion of producer-car shipments devoted to oats grow while a decrease has been registered in the number of cars carrying other cereal grains. Shipments through the first three quarters of the 2020-21 crop year continue to reflect

this trend, with oats comprising 58% of the total, while wheat, durum and barley combined comprise only 26%. Special crops such as peas, lentils and chickpeas contributed 12%, while oilseeds rounded out the final 4% of the total volume.

## Producer Cars Scheduled by Commodity



GMP Data Table 6B-2



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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