

## GMP Dashboard

Table M-1	FEB 2022	MAR 2022	2021-22 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	74.5	76.1	61.3	44.9%
Average Days In Store – Country	54.2	52.9	39.5	53.3%
Loaded Transit Time	7.6	6.7	7.2	0.9%
Average Days In Store – Terminal	12.8	16.5	14.6	55.3%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	2,226.8	2,997.0	24,200.3	-37.7%
Railway Shipments (all Western Canada traffic)	2,463.6	2,757.7	25,841.2	-41.1%
Western Port Terminal Shipments	1,432.2	1,390.3	17,378.8	-43.8%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	6,364	7,073	7,741	-38.8%
Total Western Port Car Cycle (days)	18.4	16.4	17.6	16.6%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	16,356	17,723	186,742	-42.6%
Vessel Time in Port (days)	18.3	12.8	10.6	-13.6%

*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 rose by 11.9% in March 2022, to almost 2.8 MMT from 2.5 MMT in February. This marked the second consecutive upturn in volume since record rainfalls in mid-November led to washouts and landslides that severed key road and rail routes into Vancouver. However, year-to-date grain shipments stood 41.1% below the tonnage handled a year earlier. Port shipments for March totaled 1.4 MMT, 2.9% less than in February, and a 65.4% decline from those in March 2021. Accompanying the month-over-month decline in shipments was a decrease in the average amount of time vessels spent in port, which fell to 12.8 days in March from 18.3 in February.

## Highlights for March 2022

### Traffic and Movement (page 2)

- Primary-elevator shipments were 24.2 MMT in the first eight months of the 2021-22 crop year, 37.7% less than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first eight months of the 2021-22 crop year totaled 25.8 MMT, down 41.1% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 17.4 MMT in the first eight months of the crop year, down 43.8% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks decreased by 8.1% while the average days-in-store grew by 53.3%.
- Average weekly port-terminal stocks decreased 16.0% from the same period last year, while average days-in-store climbed by 55.3% on a year-over-year basis.
- The car cycle for hopper-car movements to Western Canadian ports decreased by 11.0% in March 2022, with the preliminary average, falling to 16.4 days from 18.4 days in February. However, the YTD average of 17.6 days stood 16.6% above than that posted a year earlier. A more substantial increase was noted in the car cycle for movements into Eastern Canada, which rose by 32.8% to 28.6 days. Movements into the US saw a much lesser 5.3% increase, with the average cycle rising to 27.0 days.
- The year-to-date average for vessel time in port is 10.6 days, 13.6% less than that observed in the previous crop year.
- Port-terminal out-of-car time fell to 9.8% at Vancouver in March from 16.1% in February. At Prince Rupert, out-of-car time grew from 53.1% in February to 62.9% in March. At Thunder Bay as the shipping season began in March, out-of-car time was 3.5%.

## 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 7.2 MMT of carry-forward stocks, some 14.7% less than in 2020, the overall grain supply is estimated at 54.1 MMT. This stands 37.7% 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>	7,150.1	8,383.6	-14.7%
<b>Total Grain Supply</b>	<b>54,117.3</b>	<b>86,911.3</b>	<b>-37.7%</b>

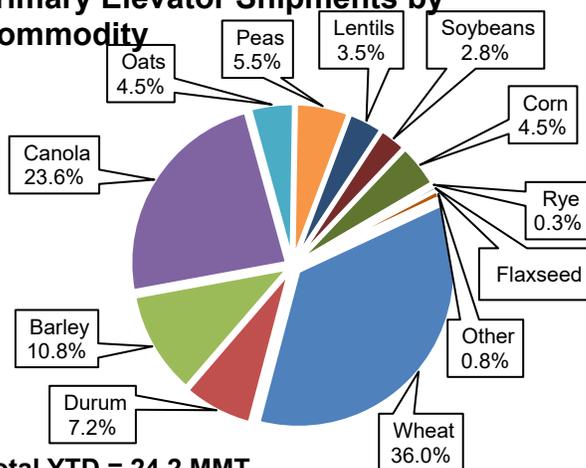
## Traffic and Movement

March producer deliveries increased slightly, averaging just under 0.7 MMT per week. Average weekly primary-elevator stock levels grew to 4.3 MMT from 4.0 MMT in February, with good space in the elevator system throughout the month.

Table M-3	MAR 2022	2021-22 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	639.8	4,932.0	-27.3%
Saskatchewan	1,262.2	10,978.4	-48.6%
Alberta	1,072.3	8,083.4	-23.3%
British Columbia	22.7	206.5	12.5%
<b>Total</b>	<b>2,997.0</b>	<b>24,200.3</b>	<b>-37.7%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	1,876.2	19,235.9	-45.7%
Shipments to Eastern Canada	233.4	1,539.4	-52.0%
Shipments to US & Mexico	572.2	4,426.3	-6.6%
Shipments Western Domestic	75.7	639.5	17.0%
<b>Total</b>	<b>2,757.7</b>	<b>25,841.2</b>	<b>-41.1%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	13,206	128,306	-43.2%
Prince Rupert	2,267	18,108	-55.9%
Churchill	0.0	0.0	-100.0%
Thunder Bay	2,250	40,328	-29.3%
<b>Total</b>	<b>17,723</b>	<b>186,742</b>	<b>-42.6%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	1,245.5	12,039.5	-44.8%
Prince Rupert	135.8	1,563.9	-58.8%
Churchill	0.0	0.0	-100.0%
Thunder Bay	9.0	3,775.4	-27.7%
<b>Total</b>	<b>1,390.3</b>	<b>17,378.8</b>	<b>-43.8%</b>



## Primary Elevator Shipments by Commodity

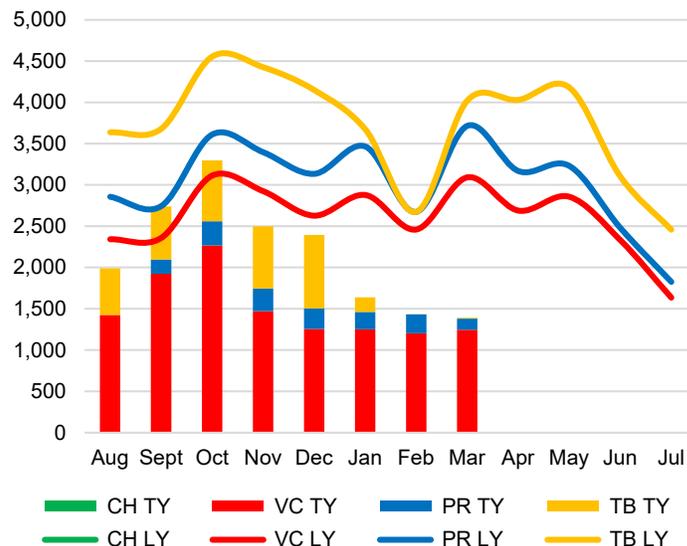


Total YTD = 24.2 MMT

GMP Data Table 2A-1

Grain shipments from primary elevators fell in the first eight months of the crop year, registering 37.7% less than in same period the previous year. Wheat, including durum, and canola continue to constitute the largest proportion of the movement at 66.8%. Movement of peas and lentils contributed 9.0% of the total.

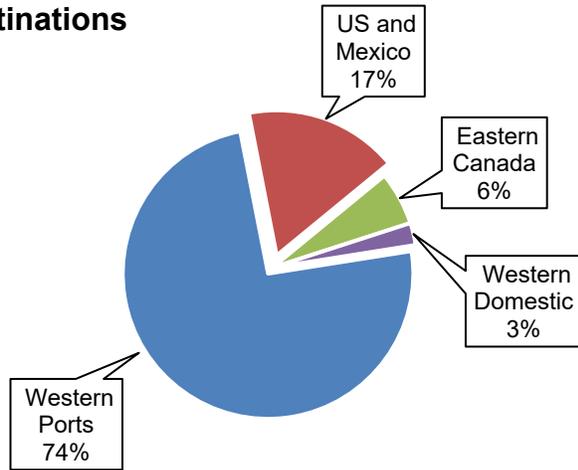
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments out of the western ports fell in the first eight months of the 2021-22 crop year, registering a decrease of 43.8% 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 44.8%, Prince Rupert was off by 58.8% and Thunder Bay shipments recorded a decrease of 27.7%.

## Western Canadian Grain Destinations

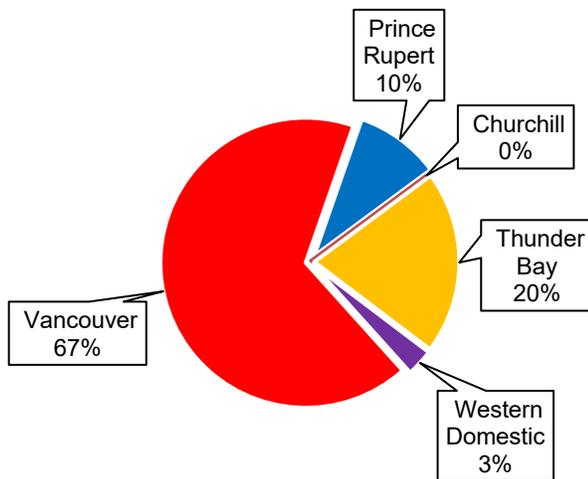


Total YTD = 25.8 MMT

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

Railway grain shipments from Western Canada totaled over 25.8 MMT in the first eight months of the 2021-22 crop year, a 41.1% decrease from the 43.9 MMT handled a year earlier. The majority, about 19.2 MMT, was directed to Western Canadian ports in support of export sales. This represented a 45.7% decline from what had been shipped in the same period the previous year, with the reduction partially offset by a 17.0% increase in Western Domestic traffic. A 52.0% decline was noted on movements into Eastern Canada, while shipments to the US and Mexico fell by 6.6%.

## Western Canadian Destined Hopper Car Traffic



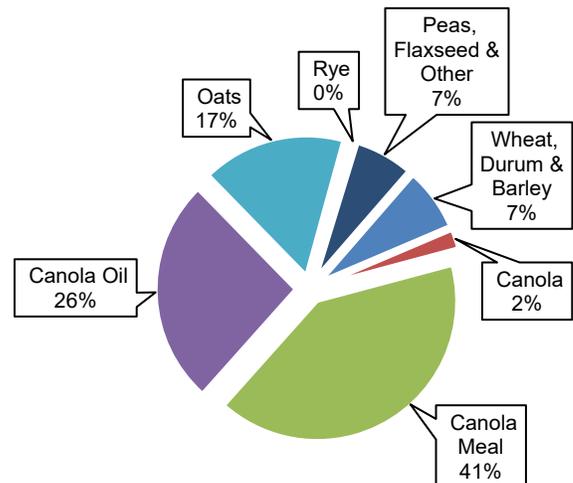
Total YTD - 19.3 MMT

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 eight months of the 2021-22 crop year this amounted to nearly 19.3 MMT, down 44.0% from the previous year. Sixty-seven 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 46.5%. The west-coast reduction was broadened by a 56.6% decline in Prince Rupert traffic as well, but tempered by a 17.3% gain in Western Domestic volumes. Shipments to Thunder Bay also declined, with volume down 27.7%, while the port of Churchill reported no export grain shipments at all.

## US Destined Grain by Commodity

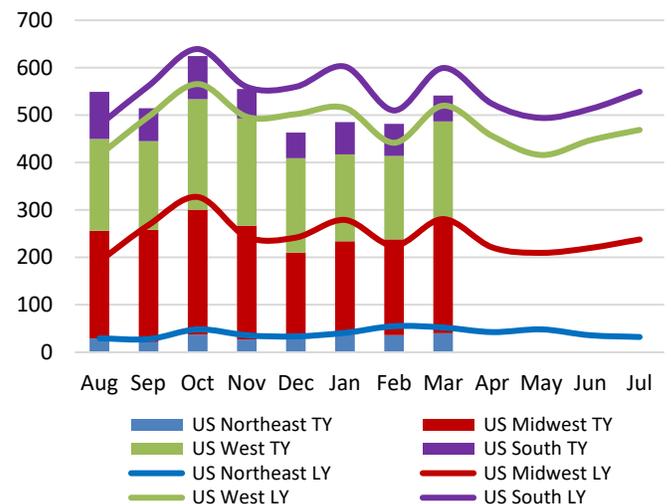


Total YTD - 4.2 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached over 4.2 MMT in the first eight months of the 2021-22 crop year, down 6.6% 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

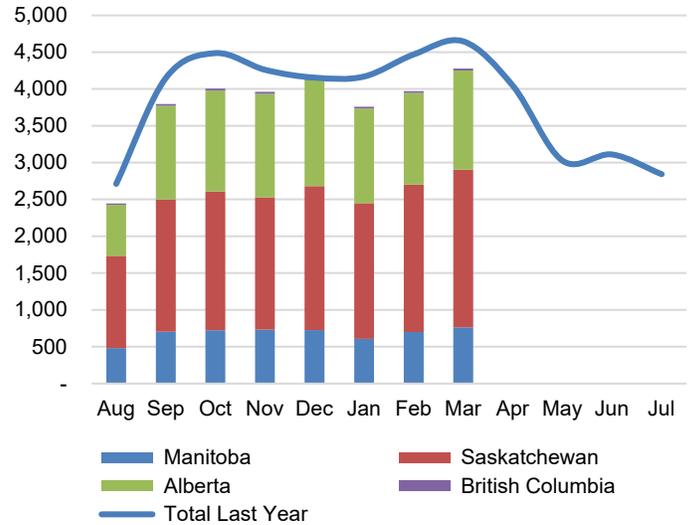
Primary elevator stocks grew modestly in March, averaging 4.3 MMT while producer deliveries remained relatively light. Overall space in the country system was good. Country stocks utilized 78% of the working capacity of the network. By province, stocks ranged from 71% of working capacity in Manitoba to 78% and 82% in Saskatchewan and Alberta respectively, and 100% in British Columbia.

The average days-in-store in the primary-elevator system for the first eight months of the crop year climbed from the same period last year, rising 53.3% to 39.5 days.

Table M-4	MAR 2022	2021-22 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	4,276.7	3,809.3	-8.1%
Average Days in Store	52.9	39.5	53.3%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	16.4	17.6	16.6%
Cycle Time to Eastern Canada	35.6	28.6	32.8%
Cycle Time to US	32.3	27.0	5.3%
Loaded Transit to Western Ports	6.7	7.2	0.9%
Loaded Transit to Eastern Canada	14.8	12.9	19.8%
Loaded Transit to US	15.6	11.6	6.6%
Rail Fleet in Grain Service	13,802	15,478	-33.9%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,131.4	1,099.9	-16.0%
Average Days in Store	16.5	14.6	55.3%
Port Unloads (hopper cars)	17,723	186,742	-42.6%
Terminal Out-of-Car Time	14.7%	21.5%	41.4%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	12.8	10.6	-13.6%
<i>Car order and order fulfillment data is not complete from both railways and will not be reported until further notice.</i>			



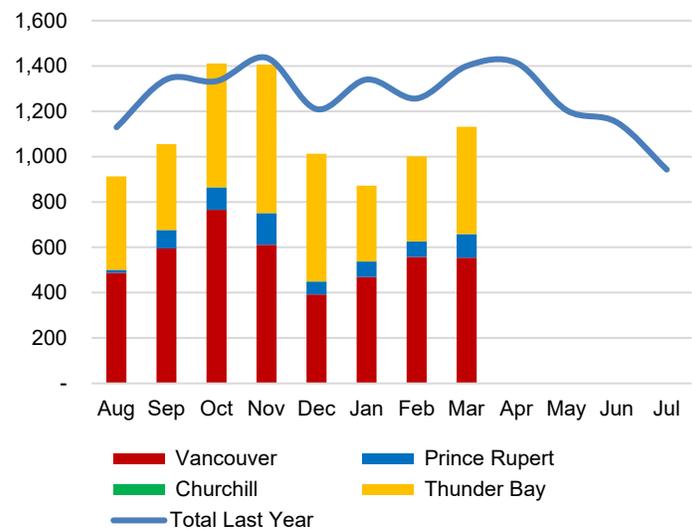
## Average Weekly Primary Elevator Stocks (000's tonnes)



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 4.3 MMT in March. Wheat, including durum, and canola, comprise 72% of the total stock. At 17% of the stock, barley, oats and peas made up much of the balance.

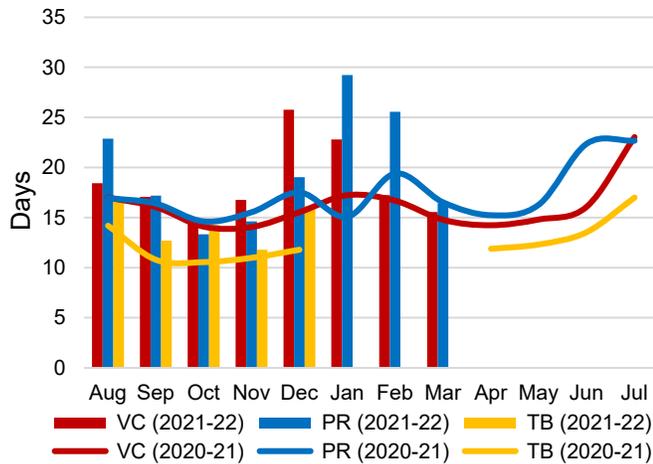
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.1 MMT in March, an increase from the previous month as rail access to Vancouver improved following the November washouts and the subsequent inclement winter conditions. Average weekly stock levels grew at Prince Rupert and Thunder Bay, while holding constant at Vancouver. Wheat, including durum, and canola, comprise just under 86% of the total stock. In March, western ports utilized just 59% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

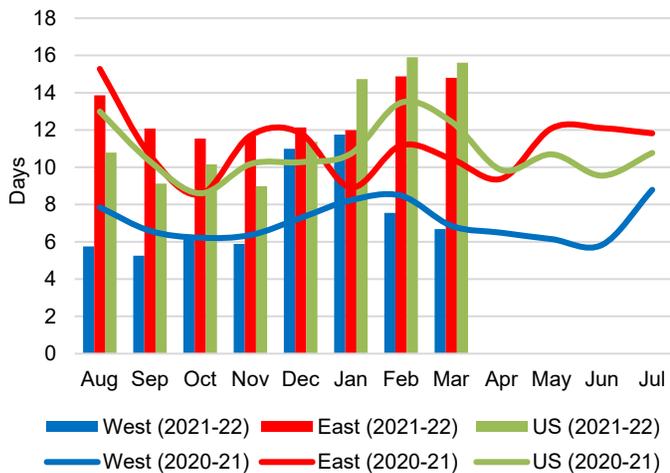


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 17.6 days in the first eight months of the 2021-22 crop year, up 16.6% from the 15.1-day average reported a year earlier. This was due to increases in each of the primary corridors, with the Vancouver average increasing 16.5%; Prince Rupert, 14.5%; and Thunder Bay 26.1%.

The car cycle into Eastern Canada also increased, rising by 32.8%, to an average of 28.6 days from 21.5 days a year earlier. A lesser 5.3% increase was noted in the cycle for US movements, which rose to an average of 27.0 days from 25.6 days the previous year.

## Average Loaded Transit Times (days)

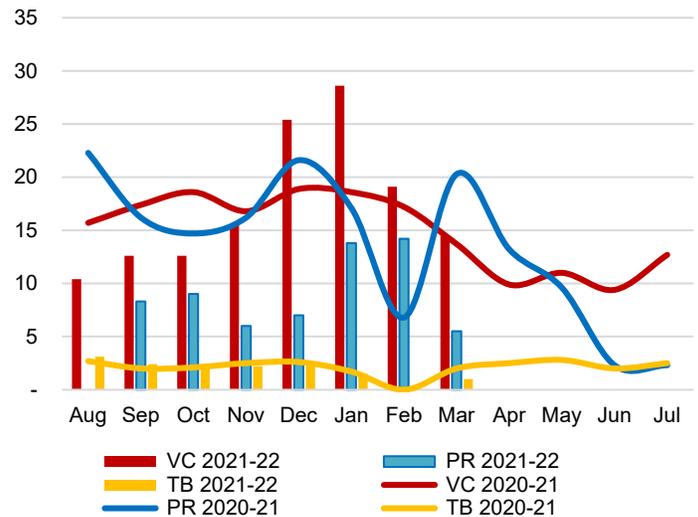


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 7.2 days in the first eight months of the 2021-22 crop year, up 0.9% from the 7.1-day average posted a year earlier. This was driven by increases in the Vancouver and Thunder Bay corridors, which rose by 1.0% and 12.0% respectively. These increases were partially offset by a 2.7% decline in the Prince Rupert corridor average. The average into Eastern Canada rose

by a more substantive 19.8%, to 12.9 days from 10.8 days a year earlier. The average on US-bound traffic rose by 6.6%, to 11.6 days from 10.9 days.

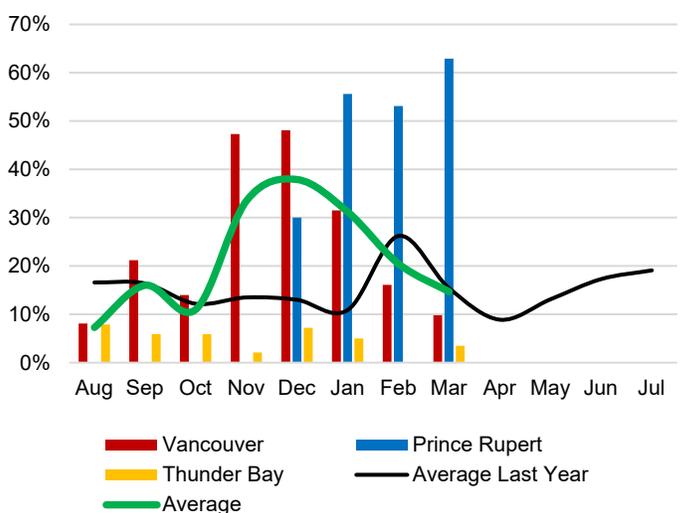
## Average Days in Port per Vessel



GMP Data Table 5D-1

In March, the overall average time vessels were in port waiting and loading grain was 12.8 days, 1.8% less than was the case in March 2021. Consistent with the lower year-over-year level, the average is 30.0% lower than that seen in the previous month. Both Vancouver and Prince Rupert saw their averages fall significantly from that seen in February. In March, the average days in port stood at 14.5 for Vancouver, 5.5 for Prince Rupert and 1.0 for Thunder Bay.

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



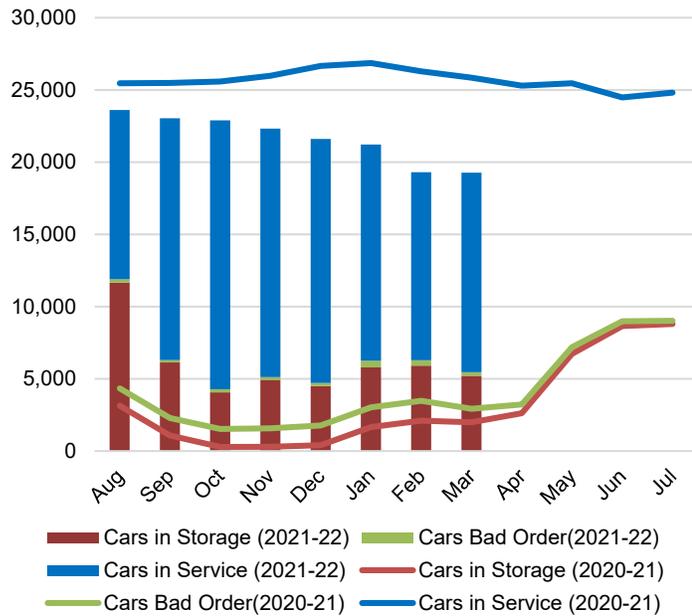
GMP Data Table 5C-5

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 14.7% in March from 20.5% in February. Terminal out-of-car time at Vancouver decreased to 9.8% while rising to 62.9% at Prince Rupert. Thunder Bay registered 3.5% for time out-of-cars as port activity geared up for the 2022 shipping season.

### Railway Grain Fleet Size and Utilization



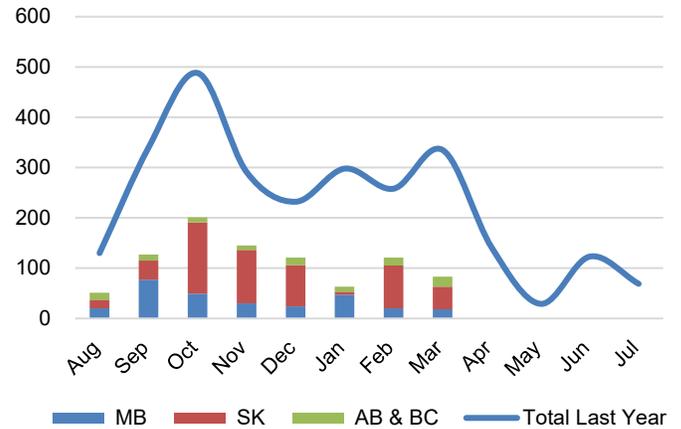
GMP Data Table 3B-2

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 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. By March they saw a pullback to 13,802 cars in service. The average cars in service for the first eight months of this crop year represents 71% of the total fleet. The balance of the fleet, comprising 29% 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 March 2022 were 75.2% less than those in March a year ago. The previous crop year saw oats shipments constituting 55% of overall producer cars scheduled, while the first two thirds of the 2021-22 crop year registered oats increasing to 59% of the overall producer-car number. Other cereal-crop shipments constitute 31% 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

