

## GMP Dashboard

Table M-1	FEB 2018	MAR 2018	2017-18 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	61.5	49.6	48.7	19.1%
Average Days In Store – Country	44.0	34.2	30.8	20.8%
Loaded Transit Time	7.9	6.2	6.2	18.8%
Average Days In Store – Terminal	9.6	9.2	11.7	14.7%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	2,679.4	3,474.1	29,840.6	-3.7%
Railway Shipments (all Western Canada traffic)	3,017.9	4,399.1	32,955.3	-4.2%
Western Port Terminal Shipments	1,801.3	2,624.6	22,481.5	-6.7%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	11,248	12,211	11,425	15.8%
Total Western Port Car Cycle (days)	19.8	16.6	15.9	14.7%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	19,213	26,536	246,792	-7.5%
Vessel Time in Port (days)	18.7	19.4	11.2	4.7%

- Order fulfilment measures have been removed from this table as comparative data is unavailable now.  
 - YTD refers to the crop year to date (extending from August 1 through to the end of this reporting period)

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

March's performance measures showed a marked improvement over those of February, demonstrating that overall railway service was improving. The railways' average car cycle to Western Canadian ports fell to 16.6 days, down 3.2 days from February's 19.8-day average. However, average weekly country elevator stock levels remained at an all-time high of 4.3 MMT, indicative of the shortage of rail capacity offered to the grain industry through this crop year.

Winter conditions across the prairies extended into March impacting operational problems for both CN and CP.

Despite these challenges, Western Canadian rail shipments rebounded in March, rising to 4.4 MMT, jumping 45.8% from February's low of 3.0 MMT. However, year-to-date shipments remained 4.2% below last year's level, totaling 33.0 MMT. Western port shipments for March totaled 2.6 MMT, registering a similar 45.7% increase from February volumes, but still 5.4% less than March of 2017. Year-to-date shipments from ports declined by a greater 6.7%. Accompanying the slowdown in shipments, is a 19.4-day average in the amount of time vessels spent in port in March, up from February's 18.7-day average.

Grain shippers and producers have continued to express their dissatisfaction with rail service through this crop year. Early in March, the Minister of Transport Canada and Agriculture and Agri-Food Canada also expressed their disappointment with rail service levels and as requested, both railways provided them with plans to the Government on the actions they are taking to improve service and recover the shortfall in tonnages moved.

## Highlights for March 2018

### Traffic and Movement (page 2)

- Primary-elevator shipments were 29.8 MMT in the first two thirds of the 2017-18 crop year, 3.7% 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 crop year totaled 33.0 MMT, down 4.2% from that handled in the same period a year earlier. Total rail shipments in March increased 45.8% compared to February.
- Crop year-to-date shipments from Western Canadian ports totaled 22.5 MMT, down 6.7% from the first eight months last year.

### System Efficiency and Performance (page 4)

- Year-to-date average weekly primary-elevator stocks increased by 16.5% from last year. The average days-in-store is up 20.8%.
- Average weekly port-terminal stocks increased 9.1% from the same period last year, while average days-in-store climbed 14.7%.
- Service improvement resulted in the railcar cycle times falling sharply in March 2018. However, corridor averages through the first eight months remained elevated: 15.9 days for movements to Western ports; 23.8 days to Eastern Canada; and 27.5 days to the US.
- The year-to-date average for vessel time in port is 11.2 days, 4.7% higher than that observed in the previous crop year.
- Port-terminal out-of-car time fell to 13.6% at Vancouver in March from 24.8% in February, and to 18.6% at Prince Rupert from 38.2% the previous month. At Thunder Bay, the out-of-car time registered 4.3% in March, up from 0.0% in February as the port remained closed through this period.

## Production and Supply

The estimate from Statistics Canada's November survey for 2017 crop production in Western Canada stands at 71.9 MMT.

This production estimate registers just 0.9% less than the 2016 production and ranks as the third largest crop grown in Western Canadian history. While Statistics Canada may incorporate further revisions into future releases, this constitutes the final estimate focused on the 2017 crop.

Coupled with carry-forward stock of 8.6 MMT, 14.7% more than in 2016, the overall grain supply is estimated to be 80.5 MMT, 0.5% more than that of the previous year and the second largest next to that seen in the 2013-14 crop year.

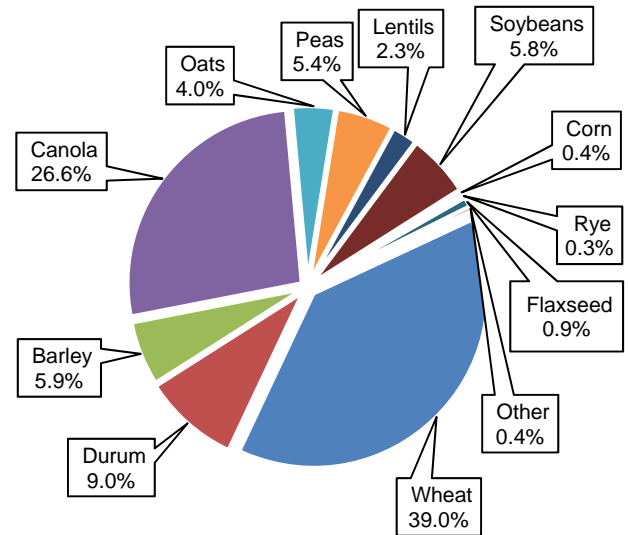
Production & Carry Over (000's tonnes) Table M-2			2017	2016	Var. from Last Yr.
Western Canada Total Production			71,911.9	72,580.9	-0.9%
Western Canada On Farm & Primary Elevator Carry Forward Stock			8,605.0	7,504.9	14.7%
<b>Total Grain Supply</b>			<b>80,516.9</b>	<b>80,085.8</b>	<b>0.5%</b>

## Traffic and Movement

As the winter advanced producer deliveries in March rose slightly from February levels, averaging about 0.8 MMT per week for the month. Average weekly primary-elevator stock levels held at nearly 4.3 MMT, with facilities in some regions experiencing congestion limiting producer delivery opportunities.

Table M-3	MAR 2018	2017-18 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	536.4	5,824.9	11.6%
Saskatchewan	1,704.7	14,508.1	-6.4%
Alberta	1,210.1	9,308.5	-6.9%
British Columbia	22.9	199.1	-19.7%
<b>Total</b>	<b>3,474.1</b>	<b>29,840.6</b>	<b>-3.7%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	3,118.0	24,582.8	-7.8%
Shipments to Eastern Canada	374.1	2,191.4	-13.1%
Shipments to US & Mexico	821.7	5,651.0	16.7%
Shipments Western Domestic	85.3	530.1	36.0%
<b>Total</b>	<b>4,399.1</b>	<b>32,955.3</b>	<b>-4.2%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	20,081	162,897	-2.6%
Prince Rupert	5,022	38,218	-15.4%
Thunder Bay	1,433	45,677	-16.3%
<b>Total</b>	<b>26,536</b>	<b>246,792</b>	<b>-7.5%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	2,091.8	14,832.4	-2.8%
Prince Rupert	476.9	3,439.8	-12.9%
Churchill	0.0	0.0	n/a
Thunder Bay	55.9	4,209.3	-14.0%
<b>Total</b>	<b>2,624.6</b>	<b>22,481.5</b>	<b>-6.7%</b>

## Primary Elevator Shipments by Commodity

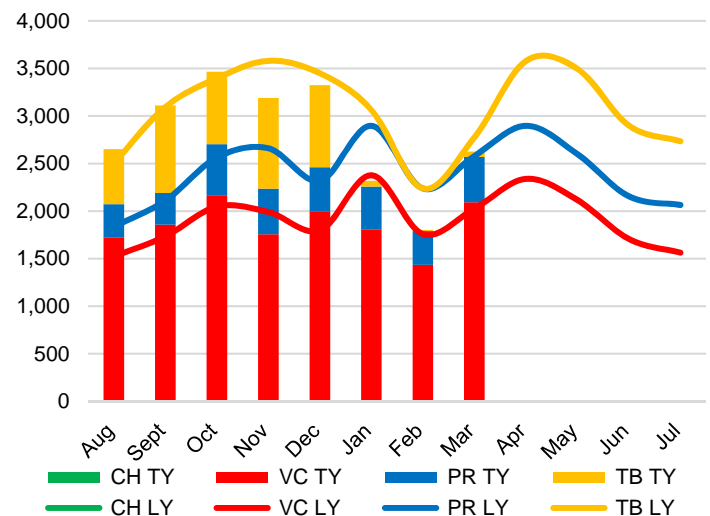


**Total YTD = 29.8 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators increased in March while registering 3.7% less than the crop-year-to-date total for the previous year. Wheat, durum and canola continue to constitute the largest proportion of the movement at 74.6%. Movement of peas and lentils have fallen dramatically, to 7.7% of the total, from 14.1% a year earlier as both tariff and non-tariff trade barriers challenge the marketing of these pulse crops.

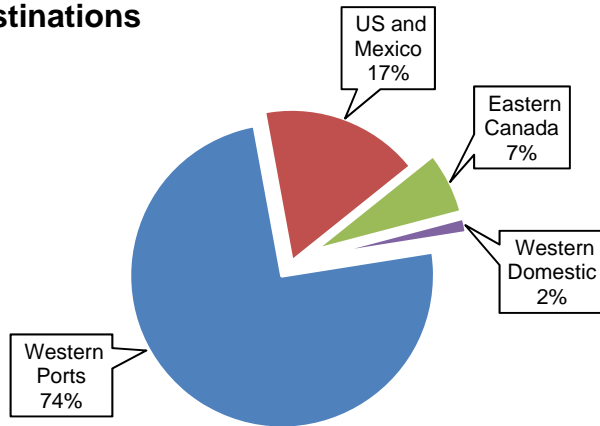
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments out of the western ports fell in the first two thirds of the crop year, registering a 6.7% decrease on a year-over-year basis. March shipments saw a 5.4% reduction from the tonnage shipped in the same month in 2017.

## Western Canadian Grain Destinations

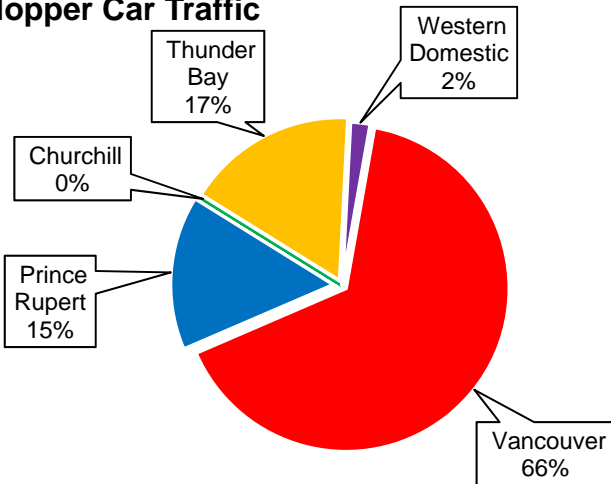


Total YTD = 33.0 MMT

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

Railway grain shipments from Western Canada totaled 33.0 MMT in the first eight months of the 2017-18 crop year, a 4.2% decrease from what was handled in the same period a year earlier. The majority, about 24.6 MMT, was directed to Western Canadian ports in support of offshore sales. This marked a 7.8% decline from what had been handled a year earlier. Shipments to Eastern Canada also declined, falling by a more substantive 13.1%. Running counter to these volume reductions were increases in: Western domestic shipments, up 36.0%; and US and Mexican shipments, up by 16.7%.

## Western Canadian Destined Hopper Car Traffic



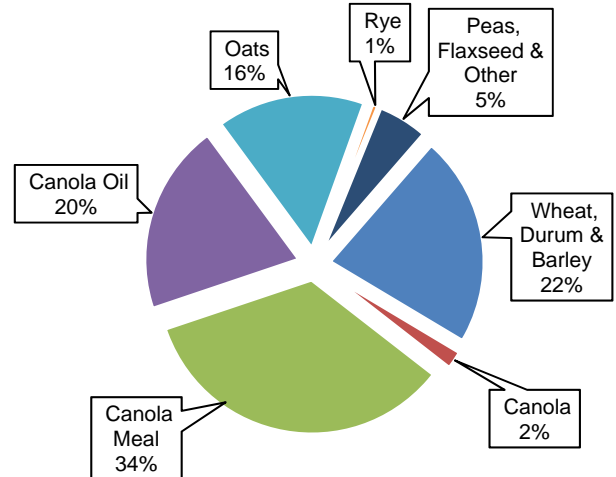
Total YTD - 23.9 MMT

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 2017-18 crop year this amounted to almost 23.9 MMT, down 7.7% from that handled in the same period a year earlier. On the receiving end, 66% of these hopper cars were destined to Vancouver, which remains the unrivaled Canadian

gateway for export grain given its ready access to Asia-Pacific markets, favourable logistical economics and year-round operations. Even so, hopper-car shipments through Vancouver during this period declined by 6.2%. Moreover, this reduction was eclipsed by steeper declines at Prince Rupert and Thunder Bay, which fell by 7.4% and 16.2% respectively due to the ongoing challenges faced by the railways.

## US Destined Grain by Commodity

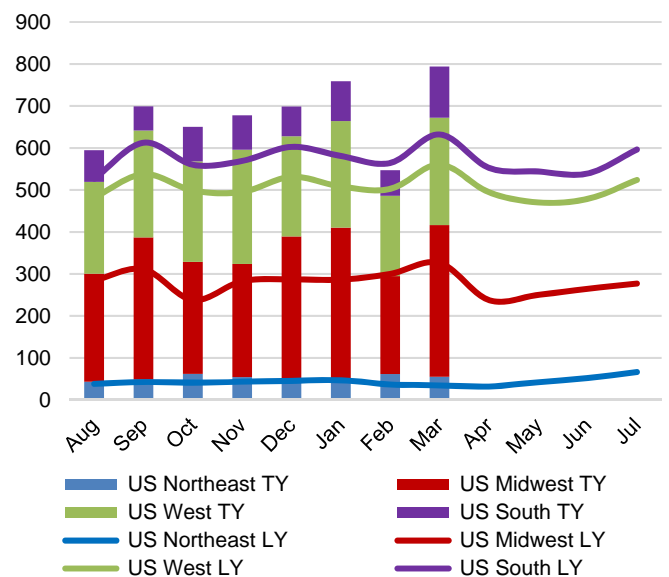


Total YTD - 5.4 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached 5.4 MMT in the first eight months of the 2017-18 crop year, a gain of 16.6% over that handled a year earlier. Over 80% of these shipments are directed into the US Midwest and West and are dominated by canola and canola products.

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



GMP Data Table 2B-18

## System Efficiency and Performance

Primary elevator stocks remained at record high levels this month. After holding for five months at 3.8 MMT, country stocks spiked to 4.3 MMT in February and March. Overall space in the country system was tight with some areas experiencing congested elevators. Country stocks utilized 89% of the working capacity of the network. By province, stocks ranged from 88% and 89% of working capacity in Manitoba and Saskatchewan respectively, to 90% in Alberta and 100% in British Columbia where many elevators were unable to accept deliveries from producers.

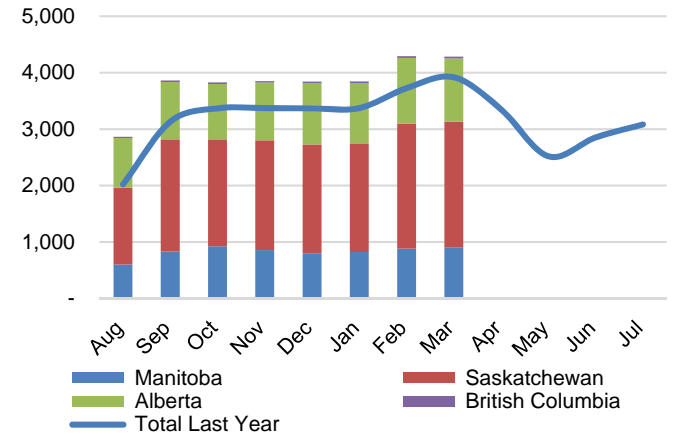
The average days-in-store in the primary-elevator system for the eight-months period increased substantially from last year, climbing 20.8%.

Table M-4	MAR 2018	2017-18 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	4,282.9	3,804.0	16.5%
Average Days in Store	34.2	30.8	20.8%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	16.6	15.9	14.7%
Cycle Time to Eastern Canada	24.3	23.8	14.8%
Cycle Time to US	27.3	27.5	12.8%
Loaded Transit to Western Ports	6.2	6.2	18.7%
Loaded Transit to Eastern Canada	9.1	10.8	23.2%
Loaded Transit to US	11.7	11.7	17.2%
Rail Fleet in Grain Service	22,686	21,513	2.6%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,280.4	1,221.7	9.1%
Average Days in Store	9.2	11.7	14.7%
Port Unloads (hopper cars)	26,536	246,792	-7.5%
Terminal Out-of-Car Time	13.6%	12.1%	-15.0%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	19.4	11.2	4.7%

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



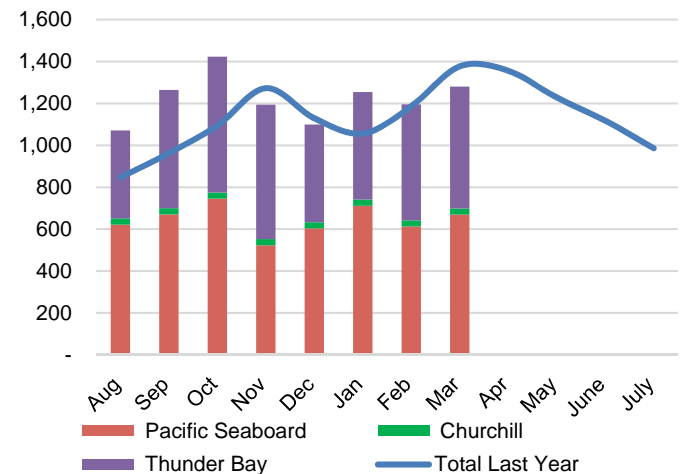
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Following a decline to 2.9 MMT in August, average country elevator stocks reversed direction and rose to 4.3 MMT in February where they held throughout March. The overall average weekly stock level in the first eight months of the crop year was 3.8 MMT, an 16.5% increase from that seen a year earlier. Wheat, including durum, and canola stock, comprise over 72% of the total stock. At 16% of the stock, barley, oats and peas made up much of the balance. Of the remaining commodities, soybeans, constituting 5% of primary elevator stock, is the most substantial.

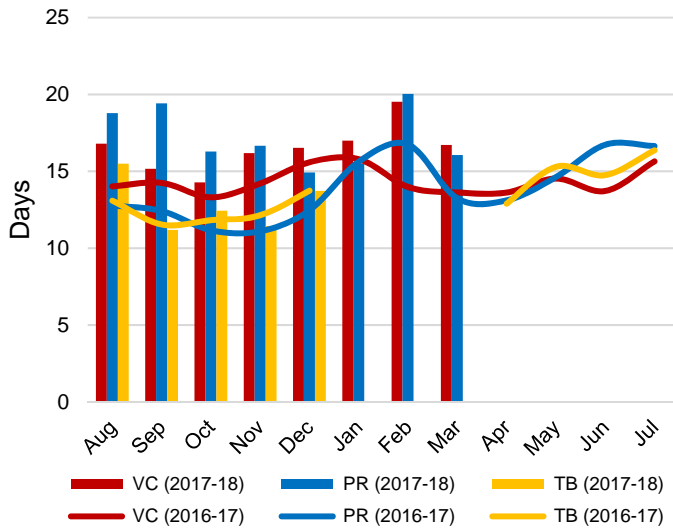
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.3 MMT in March 7% more than the level seen a month earlier. Stock levels built at both the Pacific Seaboard (Vancouver and Prince Rupert) and Thunder Bay. Wheat, including durum, and canola stock, comprises over 80% of the total stock. Abundant vessels at the Pacific Seaboard ports are waiting for grain arriving from prairie positions. In March, western ports utilized only 74% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

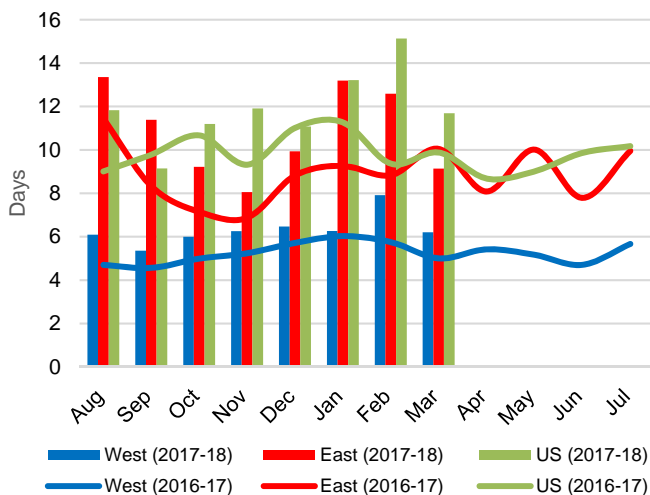


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 15.9 days in the first eight months of the 2017-18 crop year, an increase of 14.7% from the 13.9-day average posted in the same period of the previous crop year. This result was shaped by increases in all corridors, with the Prince Rupert average rising by 28.8%; Vancouver by 14.2%; and Thunder Bay by 0.9%.

Car cycles to Eastern Canada showed a similar increase during this same period, rising by 14.8%, to an average of 23.8 days from 20.7 days a year earlier. The car cycle for movements into the United States rose by a slightly lesser 12.8%, to an average of 27.5 days from the 24.4-day average posted the previous crop year.

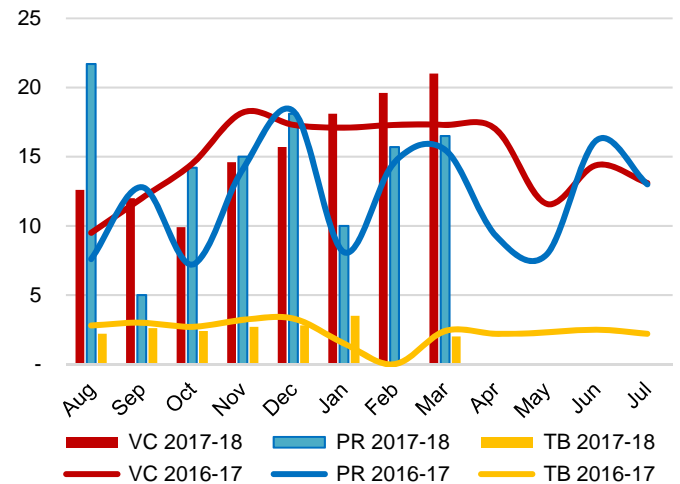
## Average Loaded Transit Times (days)



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

Loaded transit time for traffic destined to Western Canadian ports averaged 6.2 days in the first eight months of the 2017-18 crop year, up 18.7% from the 5.2-day average posted a year earlier. This result was primarily shaped by increases in the Prince Rupert and Vancouver corridors, which rose by 36.9% and 17.4% respectively, but supported by a 1.2% increase in the Thunder Bay-corridor average as well. The average loaded transit time for movements into Eastern Canada also increased sharply, rising by 23.2%, to 10.8 days from 8.8 days the year previous. The corresponding average for US-destined traffic saw a much lesser increase, rising by 17.2%, to 11.7 days from the 10.0-day average posted twelve months earlier.

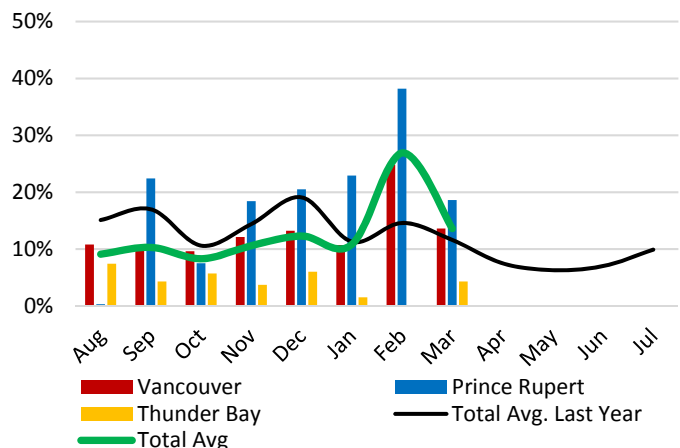
## Average Days in Port per Vessel



GMP Data Table 5D-1

In March, the overall average time vessels were in port waiting and loading grain was 28.5% more than in the same month of the previous year, while rising 3.7% from that seen in February. Increases were registered at both Vancouver and Prince Rupert; with the former port posting a more substantial month-over-month gain. In March, the days in port stood at 21.0 for Vancouver, and 16.5 for Prince Rupert.

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



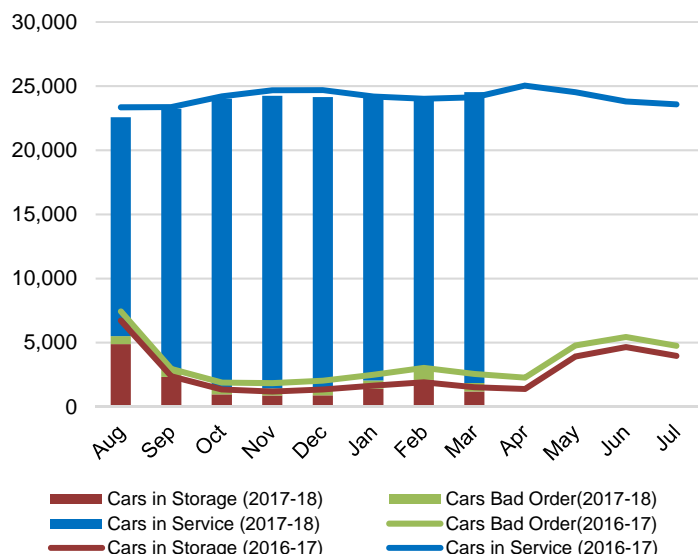
GMP Data Table 5C-5



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).

Notwithstanding some fluctuation, the percentage of time terminals are out of cars has charted a trend of improvement from its high of 29.8% in January of 2015. Deteriorating service resulted in the aggregate measure for all ports spiking to 26.9% in February 2018 before falling to 13.6% in March. Terminal out-of-car time at Vancouver declined to 13.6% in March, and to 18.6% at Prince Rupert. Thunder Bay operations were largely wound down until late March.

### Railway Grain Fleet Size and Utilization



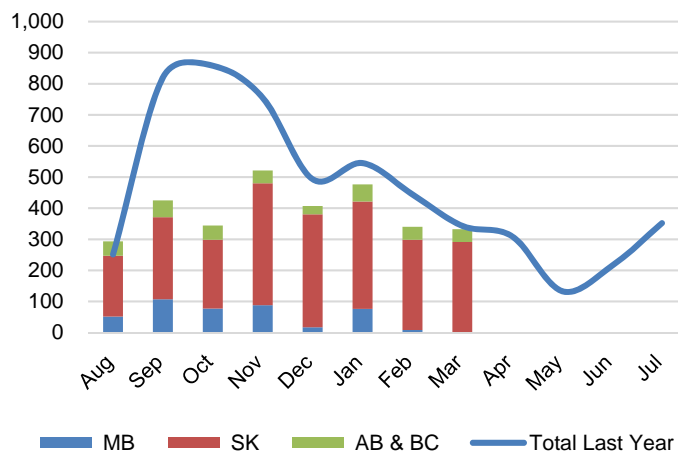
GMP Data Table 3B-2

During times of heavy demand for grain hopper cars, nearly all of the hopper-car fleet is placed in service. As traffic volumes decreased in the latter months of the 2016-17 crop year, railways began the process of moving cars into storage. In July 2017, a weekly average of 18,832 cars, representing 80% of the fleet was

in active service. With growing demand, the cars in service rose to average 22,826 per week in November before declining throughout the winter and then rebounding to an average of 22,686 per week in March, encompasses 92% of the overall fleet. The balance of the fleet, comprising 8% of the rail cars, is in storage or repair status (bad order).

## Producer Cars

### Producer Cars Scheduled by Province



GMP Data Table 6B-2

Producer car shipments have shifted from primarily being wheat, durum, and oats to reflect a significant increase in the number of cars carrying special crops. Shipments throughout the first eight months of the 2017-18 crop year continue to reflect this trend, with the traditional commodities comprising only 71% of the total. This compares to 87% in the 2013-14 crop year. Special crops such as peas, lentils and chickpeas contributed 17% of the current volume.



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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

