

## GMP Dashboard

Table M-1	OCT 2019	NOV 2019	2019-20 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	37.4	41.9	37.9	-11.9%
Average Days In Store – Country	20.7	24.0	20.9	-12.9%
Loaded Transit Time	6.0	6.6	6.1	-13.6%
Average Days In Store – Terminal	10.7	11.3	10.9	-8.4%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	5,343.4	4,071.7	16,336.7	-7.2%
Railway Shipments (all Western Canada traffic)	5,304.9	5,080.6	18,625.2	-3.3%
Western Port Terminal Shipments	3,521.2	3,202.3	12,345.0	-2.7%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	10,689	12,251	9,546	-18.8%
Total Western Port Car Cycle (days)	14.8	13.8	15.1	-0.3%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	44,517	34,184	136,090	-6.1%
Vessel Time in Port (days)	9.5	10.5	9.1	-5.2%

*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 rail shipments totaled 5.1 MMT in November 2019, down 4.2% from 5.3 MMT in October. The decline was largely attributable to the effects of an eight-day strike at CN. Year-to-date shipments of 18.6 MMT stood 3.3% less than the 19.3 MMT shipped in the first four months of the previous crop year. November weather conditions continued to challenge the harvest across the prairies, although limited progress was made in some regions resulting in over 90% completion in each of the western provinces. Port shipments for November total 3.2 MMT, a 9.1% decrease from October. Accompanying the decrease in shipments has been an increase in the average amount of time vessels spend in port – rising to 10.5 days in November from 9.5 in October.

## Highlights for November 2019

### Traffic and Movement (page 2)

- Primary-elevator shipments were 16.3 MMT in the first four months of the 2019-20 crop year, 7.2% 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 2019-20 crop year totaled 18.6 MMT, down 3.3% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 12.3 MMT, down 2.7% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks decreased by 18.2% while the average days-in-store fell by 12.9%.
- Average weekly port-terminal stocks decreased 10.2% from the same period last year, while average days-in-store declined 8.4%.
- The car cycle for hopper-car movements to Western Canadian ports decreased in November 2019, with the preliminary average falling to 13.8 days from 14.8 days in October. The year-to-date average also fell by a marginal 0.3%, remaining effectively unchanged from the 15.1-day average reported a year earlier. Slightly deeper declines were noted in the year-to-date averages of all other corridors: by 3.9%, to 20.3 days, on movements to Eastern Canada; and by 2.3%, to 24.8 days, on movements to the US.
- The year-to-date average for vessel time in port is 9.1 days, 5.2% lower than that observed in the previous crop year.
- Port-terminal out-of-car time increased to 10.6% at Vancouver in November from 8.3% in October. At Prince Rupert, the out-of-car time jumped to 21.1% in November, up from 8.9% in October and at Thunder Bay it was up slightly to 2.3% from 2.2% a month earlier.

## Production and Supply

Statistics Canada's November survey for 2019 crop production in Western Canada stands at 73.5 MMT, a 2.4% increase from the 2018 harvest. This constitutes the second largest crop on record. This production estimate reflects a reduction of 1.7 MMT from the model-based estimate released by Statistics Canada in September, marking the challenging fall weather conditions and inability to complete harvest prior to the arrival of winter.

Coupled with carry-forward stock of 8.4 MMT at the end of July 2019, 19.3% less than in 2018, the overall grain supply is estimated to be 81.9 MMT. The projected supply is 0.3% less than that of the previous year, but still registers among the largest on record and will ensure heavy demands on the GHTS throughout the coming crop year.

Table M-2	2019	2018	Var. from Last Yr.
<b>Production &amp; Carry Over (000's tonnes)</b>			
Western Canada Total Production	73,455.2	71,723.6	2.4%
Western Canada On Farm & Primary Elevator Carry Forward Stock	8,397.5	10,404.0	-19.3%
<b>Total Grain Supply</b>	<b>81,852.7</b>	<b>82,128.2</b>	<b>-0.3%</b>

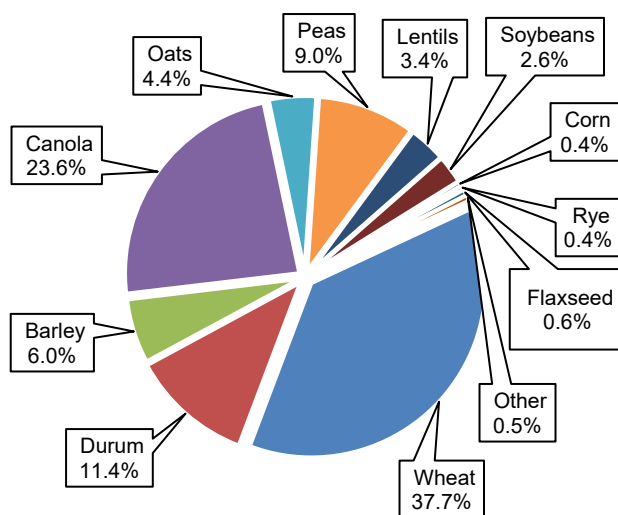
## Traffic and Movement

Despite ongoing late harvest work, November producer deliveries averaged just under 1.1 MMT per week. Average weekly primary-elevator stock levels grew to 3.5 MMT from 3.2 MMT in October, with good space available in facilities prairies wide.

Table M-3	NOV 2019	2019-20 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	709.0	3,428.1	-11.0%
Saskatchewan	2,203.8	8,591.7	-8.3%
Alberta	1,133.5	4,184.2	-1.2%
British Columbia	25.5	132.7	25.9%
<b>Total</b>	<b>4,071.8</b>	<b>16,336.7</b>	<b>-7.2%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	4,068.1	14,924.6	-4.0%
Shipments to Eastern Canada	311.2	1,024.9	-1.5%
Shipments to US & Mexico	616.6	2,355.7	-2.3%
Shipments Western Domestic	84.7	320.0	19.9%
<b>Total</b>	<b>5,080.6</b>	<b>18,625.2</b>	<b>-3.3%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	19,208	81,631	-7.2%
Prince Rupert	4,840	17,166	-20.6%
Churchill	71	1,434	n/a
Thunder Bay	10,065	35,859	1.2%
<b>Total</b>	<b>34,184</b>	<b>136,090</b>	<b>-6.1%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	1,777.2	7,409.7	-3.3%
Prince Rupert	488.5	1,565.9	-21.2%
Churchill	33.6	137.3	410.4%
Thunder Bay	903.0	3,232.1	7.2%
<b>Total</b>	<b>3,202.3</b>	<b>12,345.0</b>	<b>-2.7%</b>



## Primary Elevator Shipments by Commodity

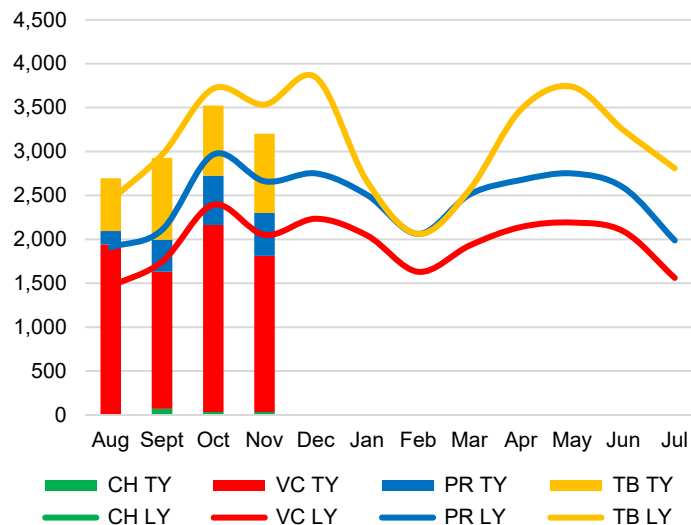


Total YTD = 16.3 MMT

GMP Data Table 2A-1

Grain shipments from primary elevators decreased in November, registering 7.2% less than the crop-year-to-date total for 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 weakened further in the month, constituting 12.4% of the total, down from 13.4% in October.

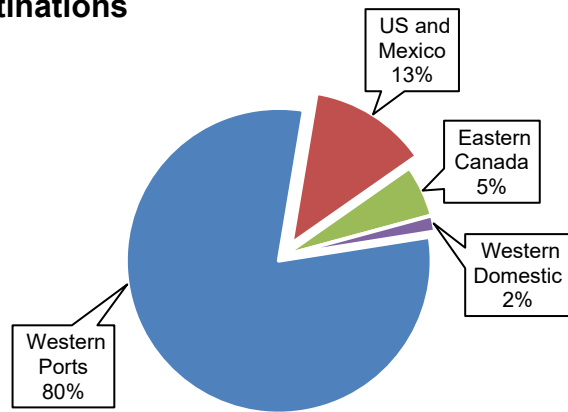
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments out of the western ports fell in November, registering a decline of 2.7% on a year-over-year basis. Despite slower movement out of the primary elevators exacerbated by the eight-day rail strike, a steady export program kept most terminal elevators active in November.

## Western Canadian Grain Destinations

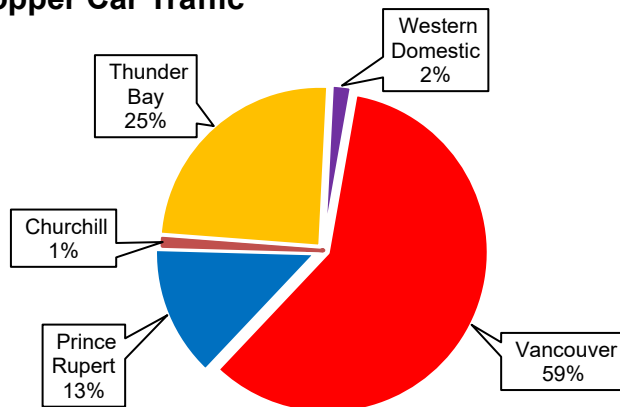


Total YTD = 18.6 MMT

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

Railway grain shipments from Western Canada totaled 18.6 MMT in the first four months of the 2019-20 crop year, a 3.3% decline from the 19.2 MMT handled a year earlier. The majority, about 14.9 MMT, was directed to Western Canadian ports in support of export sales. This proved to be 4.0% less than what had been shipped the previous year. Shipments to Eastern Canada also fell, albeit by a lesser 1.5%. A 2.3% decline in shipments to the US and Mexico was also noted. Running counter to these losses was a 19.9% increase in Western Domestic traffic.

## Western Canadian Destined Hopper Car Traffic



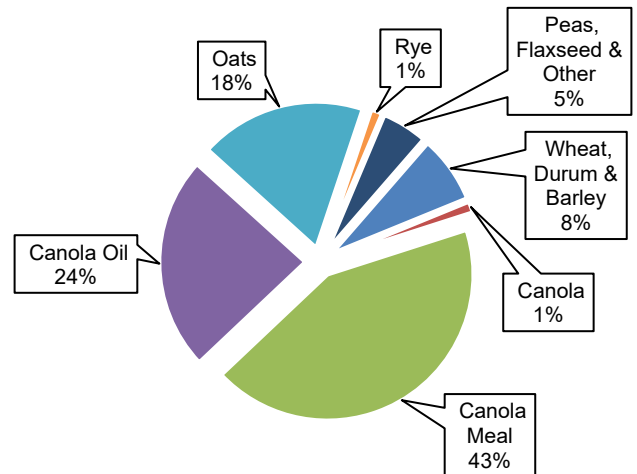
Total YTD - 14.6 MMT

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 four months of the 2019-20 crop year this amounted to 14.6 MMT, down 3.3% from a year earlier. Fifty-nine percent of these hopper cars were destined to Vancouver, which remains the busiest grain-exporting port owing to its ready access to Asia-Pacific markets, favourable logistical economics and year-round operations.

Hopper-car shipments through Vancouver during this period fell by 7.0%. A more substantive 14.7% volume decline was recorded by Prince Rupert. Conversely, Thunder Bay shipments rose by 9.8%; Western Domestic, 27.1%; along with shipments through the reopened port of Churchill.

## US Destined Grain by Commodity

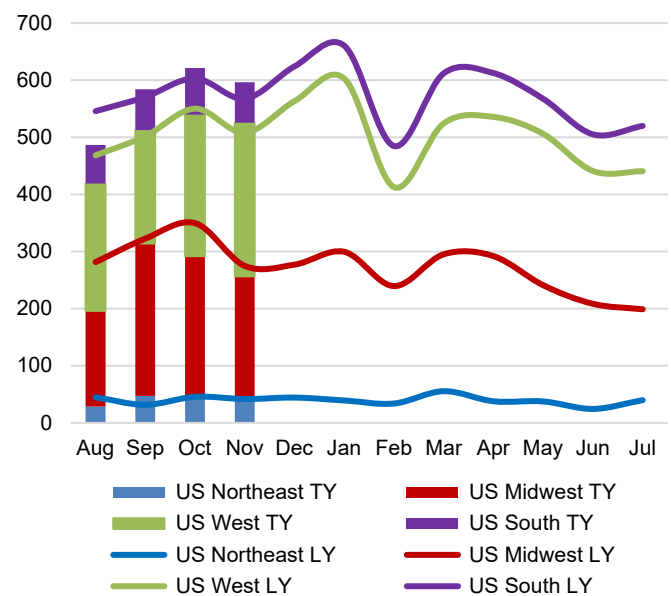


Total YTD - 2.3 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached slightly under 2.3 MMT in the first four months of the 2019-20 crop year, unchanged 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 grew in November to average 3.5 MMT as 2019 harvest progress drew to a close. Overall space in the country system was good. Country stocks utilized 70% of the working capacity of the network. By province, stocks ranged from 61% of working capacity in Manitoba, to 71% and 74% in Saskatchewan and Alberta respectively, and 94% in British Columbia.

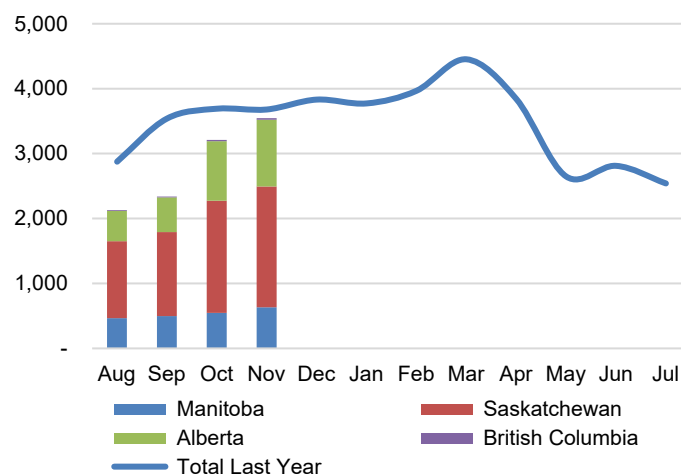
The average days-in-store in the primary-elevator system for November fell slightly from November last year, down 3.7%.

Table M-4	NOV 2019	2019-20 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	3,545.0	2,830.0	-18.2%
Average Days in Store	24.0	20.9	-12.9%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	13.8	15.1	-0.3%
Cycle Time to Eastern Canada	17.5	20.3	-3.9%
Cycle Time to US	23.1	24.8	-2.3%
Loaded Transit to Western Ports	6.6	6.1	-13.6%
Loaded Transit to Eastern Canada	8.1	9.5	-4.6%
Loaded Transit to US	9.0	8.8	-16.5%
Rail Fleet in Grain Service	24,255	20,036	1.9%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,306.4	1,094.2	-10.2%
Average Days in Store	11.3	10.9	-8.4%
Port Unloads (hopper cars)	34,184	136,090	-6.1%
Terminal Out-of-Car Time	9.7%	9.1%	-23.5%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	10.5	9.1	-5.2%

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



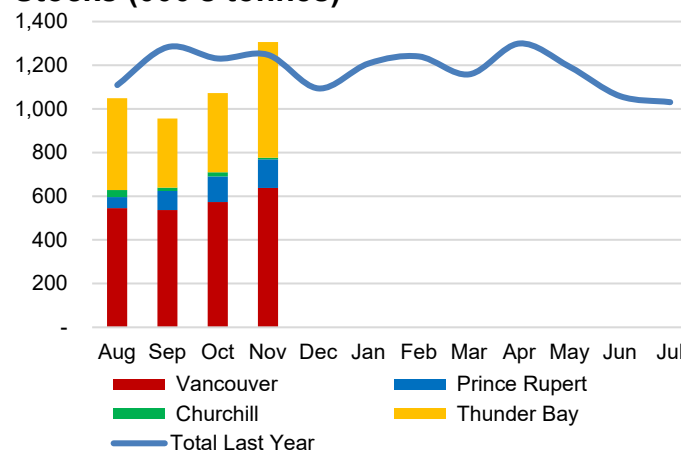
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.5 MMT in store. In August, they pulled back further to average 2.1 MMT before reversing direction and rising to average 3.5 MMT by November. Wheat, including durum, and canola, comprise 71% of the total stock. At 18% of the stock, barley, oats and peas made up much of the balance.

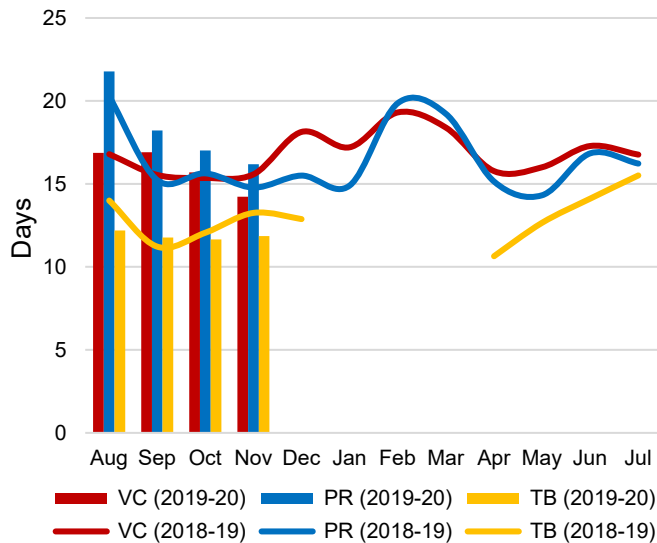
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.3 MMT in November, 22% higher than a month earlier. Average weekly stock levels grew at Vancouver, Prince Rupert and Thunder Bay despite the effects of the eight-day strike which impeded CN's ability to deliver grain to ports. Churchill saw stocks decline as the shipping season at the port came to a close. Wheat, including durum, and canola, comprise over 75% of the total stock. In November, western ports utilized 73% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

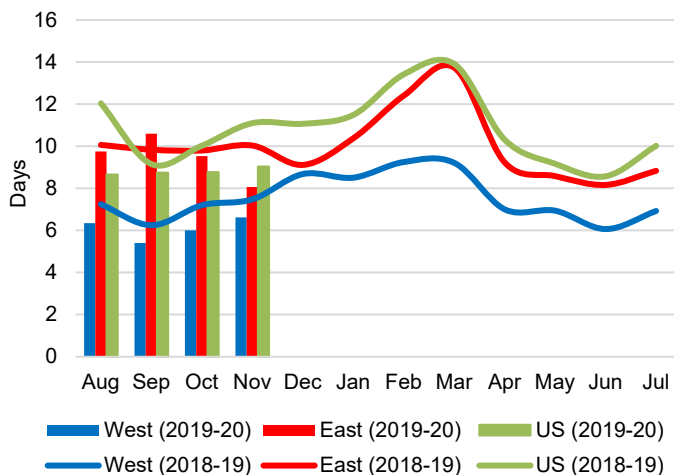


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 15.1 days in the first four months of the 2019-20 crop year, down 0.3% from the 15.2-day average reported in the same period a year earlier. This was largely the result of a decrease in the Thunder Bay corridor, which fell by 6.3%. This proved enough to offset increases in the Vancouver and Prince Rupert corridors, which rose by 1.1% and 8.7% respectively.

Car cycles to Eastern Canada also decreased during this period, falling by 3.9%, to an average of 20.3 days from 21.1 days a year earlier. The car cycle for movements into the United States fell by a lesser 2.3%, to an average of 24.8 days from 25.4 days.

## Average Loaded Transit Times (days)

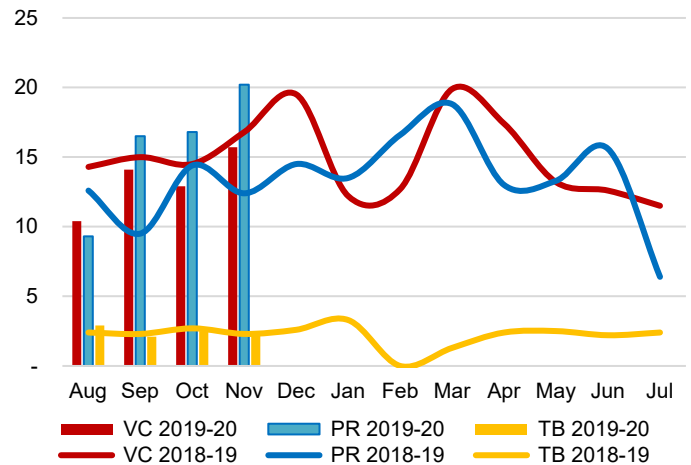


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 6.1 days in the first four month of the 2019-20 crop year, down 13.6% from the 7.1-day average posted a year earlier. This was the result of decreases in all three major corridors, with

Vancouver down by 12.3%; Prince Rupert, 4.2%; and Thunder Bay, 21.2%. The average loaded transit time for movements into Eastern Canada fell by 4.6%, to 9.5 days from 10.0 days a year earlier. The corresponding average for US-destined traffic saw an even sharper decline, falling 16.5%, to 8.8 days from the 10.5-day average posted a year earlier.

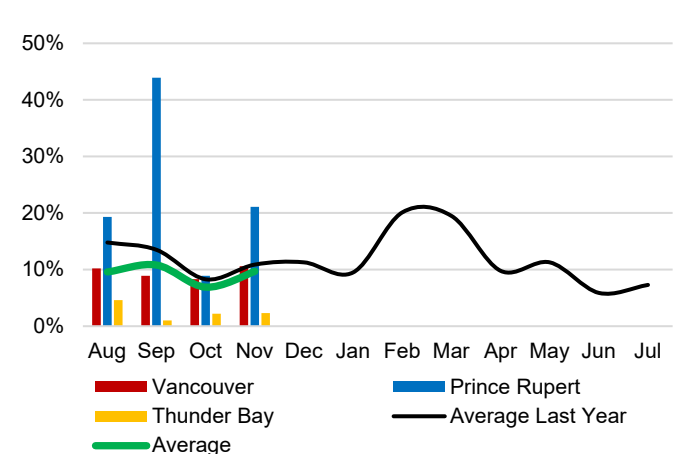
## Average Days in Port per Vessel



GMP Data Table 5D-1

In November, the overall average time vessels were in port waiting and loading grain was 10.5 days, 2.9% higher than in November of 2018. The eight-day strike contributed to the average being 10.7% higher than that seen in the previous month. Vancouver and Prince Rupert both experienced increases in November, while at Thunder Bay days-in-port held steady with that seen in October. In November, the days in port stood at 15.7 for Vancouver, 20.2 at Prince Rupert and 2.5 at Thunder Bay.

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



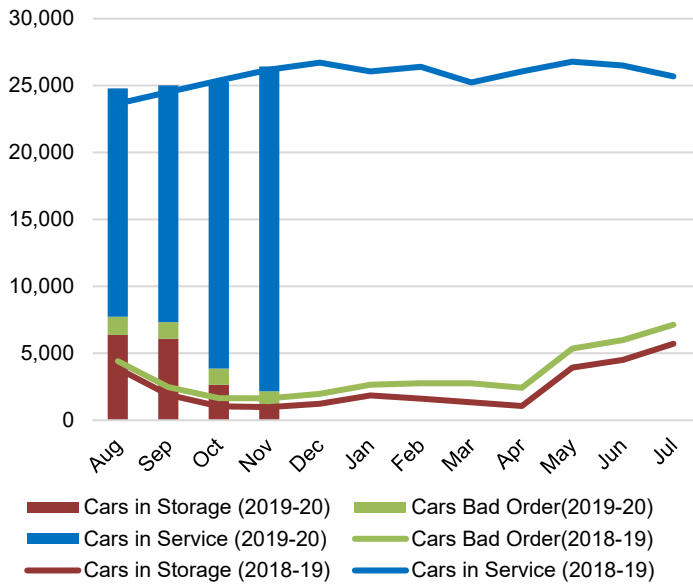
GMP Data Table 5C-5

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 grew to 9.7% in November from 6.9% in October. Terminal out-of-car time at Vancouver increased to 10.6% in November, to 21.2% at Prince Rupert and to 2.3% at Thunder Bay.

### Railway Grain Fleet Size and Utilization



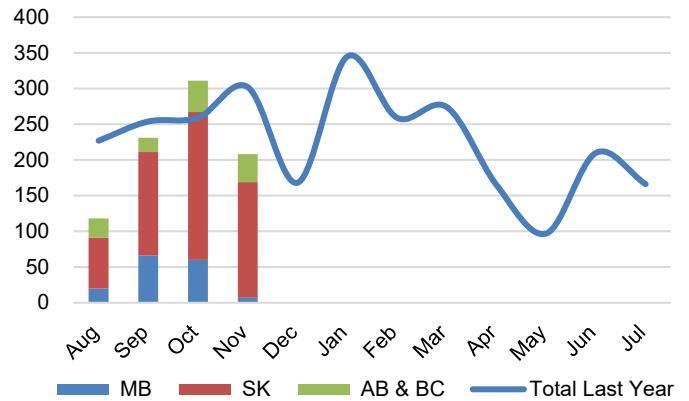
GMP Data Table 3B-2

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 2018-19 crop year as in July 2019, a weekly average of 18,548 cars representing 72% of the fleet, was in active service. Cars in service fell further in August, to 17,062 before reversing direction

and rising to 24,255 by November. For the first four months of this crop year, an overall average of 20,036 cars per week, representing 79% of the overall fleet, was in grain service. The balance of the fleet, comprising 21% 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 fell in the fourth month of the crop year as the number of applications placed with the Canadian Grain Commission declined. Crop-year-to-date shipments saw oats comprising 66% of the total, while wheat and durum made up 17% of the movement. Special crops such as peas and lentils contributed 10% of the 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

