

## GMP Dashboard

Table M-1	APR 2022	MAY 2022	2021-22 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	68.5	69.3	62.6	50.1%
Average Days In Store – Country	39.0	44.5	39.8	57.7%
Loaded Transit Time	6.2	5.2	7.0	0.7%
Average Days In Store – Terminal	23.3	19.7	15.8	66.3%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	2,901.1	2,096.2	29,197.6	-38.2%
Railway Shipments (all Western Canada traffic)	2,939.9	2,233.7	31,014.8	-42.6%
Western Port Terminal Shipments	1,573.1	1,808.2	20,760.1	-46.9%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	6,564	4,585	7,335	-39.9%
Total Western Port Car Cycle (days)	15.9	16.9	17.5	17.2%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	16,842	13,674	218,096	-45.8%
Vessel Time in Port (days)	5.7	5.9	9.8	-12.6%

*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 fell by 24.0% in May 2022, to 2.2 MMT from 2.9 MMT in April. This marked the lowest monthly volume yet recorded during the crop year and reflected the depletion of available grain supplies entering the fourth quarter. Owing to a significantly smaller crop, year-to-date railway shipments fell by 42.6%, to 31.0 MMT. Port shipments for May totaled 1.8 MMT, 14.9% more than in April, but a 56.8% decline from those in May 2021. Mirroring the April-to-May increase in shipments was an increase in the average amount of time vessels spent in port, which grew to 5.9 days in May from 5.7 in April.

## Highlights for May 2022

### Traffic and Movement (page 2)

- Primary-elevator shipments were 29.2 MMT in the first ten months of the 2021-22 crop year, 38.2% less than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first ten months of the 2021-22 crop year totaled 31.0 MMT, down 42.6% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 20.8 MMT in the first ten months of the crop year, down 46.9% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks decreased by 6.5% while the average days-in-store grew by 57.7%.
- Average weekly port-terminal stocks decreased 13.2% from the same period last year, while average days-in-store climbed by 66.3% on a year-over-year basis.
- The car cycle for hopper-car movements to Western Canadian ports increased by 6.3% in May 2022, with the preliminary average rising to 16.9 days from 15.9 days in April. The YTD average of 17.5 days stood 17.2% 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 38.4% to 29.7 days. Movements into the US saw a much lesser 6.8% increase, with the average cycle rising to 27.7 days.
- The year-to-date average for vessel time in port is 9.8 days, 12.6% less than that observed in the previous crop year.
- Port-terminal out-of-car time fell to 1.0% at Vancouver in May from 5.8% in April. At Prince Rupert, out-of-car time grew from 48.9% in April to 73.2% in May, while Thunder Bay saw a modest increase to 4.5% from 3.1% the previous month.

## 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>			
Western Canada Total Production	46,967.2	78,527.7	-40.2%
Western Canada On Farm & Primary Elevator Carry Forward Stock	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

May producer deliveries continued a downward trend, averaging just over 0.25 MMT per week. Average weekly primary-elevator stock levels fell to 3.2 MMT from 4.0 MMT in April, with good space in the elevator system throughout the month.

Table M-3	MAY 2022	2021-22 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	357.5	5,812.4	-30.6%
Saskatchewan	1,022.9	13,340.7	-47.7%
Alberta	702.9	9,806.6	-25.3%
British Columbia	12.9	237.9	16.2%
<b>Total</b>	<b>2,096.2</b>	<b>29,197.6</b>	<b>-38.2%</b>

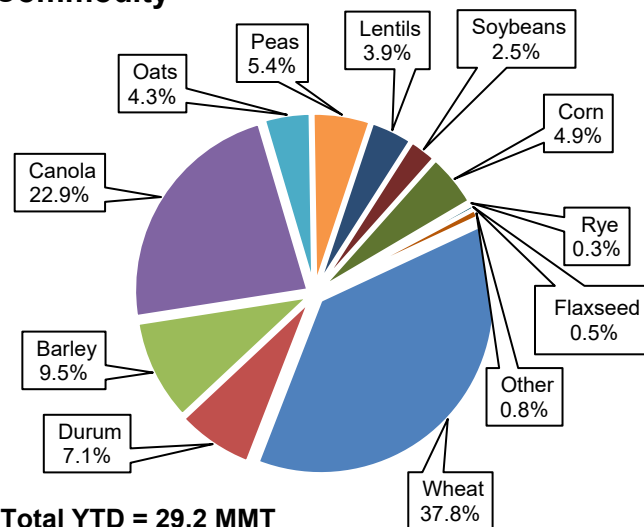
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	1,548.8	22,855.0	-47.9%
Shipments to Eastern Canada	149.5	1,909.2	-47.5%
Shipments to US & Mexico	470.9	5,449.3	-6.4%
Shipments Western Domestic	64.5	801.2	12.3%
<b>Total</b>	<b>2,233.7</b>	<b>31,014.8</b>	<b>-42.6%</b>

<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	7,749	146,492	-47.6%
Prince Rupert	1,370	22,014	-54.8%
Churchill	0.0	0.0	-100.0%
Thunder Bay	4,555	49,590	-32.3%
<b>Total</b>	<b>13,674</b>	<b>218,096</b>	<b>-45.8%</b>

<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	1,069.3	13,885.8	-49.2%
Prince Rupert	168.0	2,004.4	-56.9%
Churchill	0.0	0.0	-100.0%
Thunder Bay	570.9	4,869.9	-30.8%
<b>Total</b>	<b>1,808.2</b>	<b>20,760.1</b>	<b>-46.9%</b>



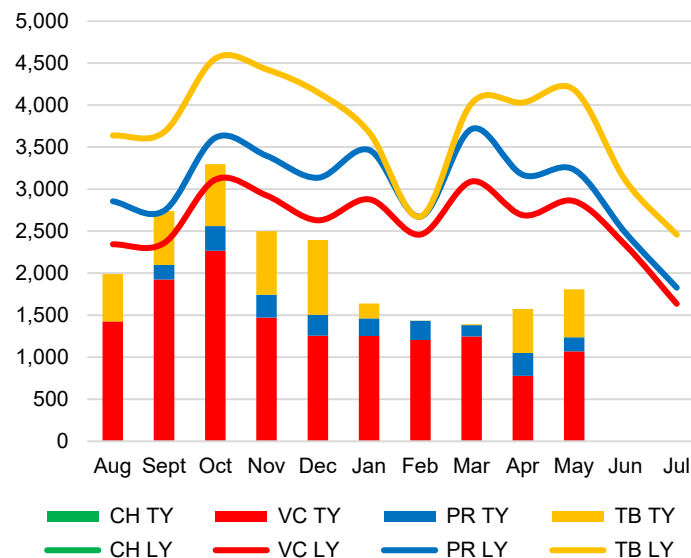
## Primary Elevator Shipments by Commodity



GMP Data Table 2A-1

Grain shipments from primary elevators fell in the first ten months of the crop year, registering 38.2% less than in same period the previous year. Wheat, including durum, and canola continue to constitute the largest proportion of the movement at 67.8%. Movement of peas and lentils contributed 9.3% of the total.

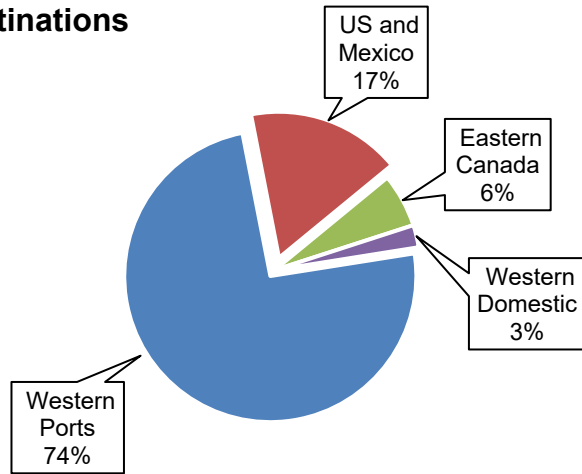
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk shipments out of the western ports fell in the first ten months of the 2021-22 crop year, registering a decrease of 46.9% 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 49.2%, Prince Rupert was off by 56.9% and Thunder Bay shipments recorded a decrease of 30.8%.

## Western Canadian Grain Destinations

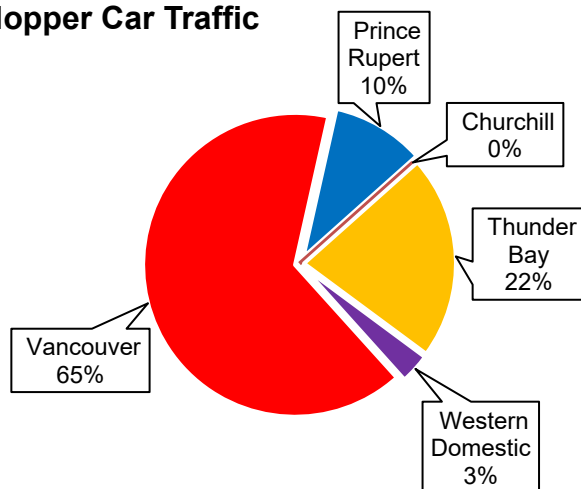


Total YTD = 31.0 MMT

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

Railway grain shipments from Western Canada totaled over 31.0 MMT in the first ten months of the 2021-22 crop year, a 42.6% decrease from the 54.1 MMT handled a year earlier. The majority, about 22.9 MMT, was directed to Western Canadian ports in support of export sales. This represented a 47.9% decline from what had been shipped in the same period the previous year, with the reduction partially offset by a 12.3% increase in Western Domestic traffic. A 47.5% decline was noted on movements into Eastern Canada, while shipments to the US and Mexico fell by 6.4%.

## Western Canadian Destined Hopper Car Traffic



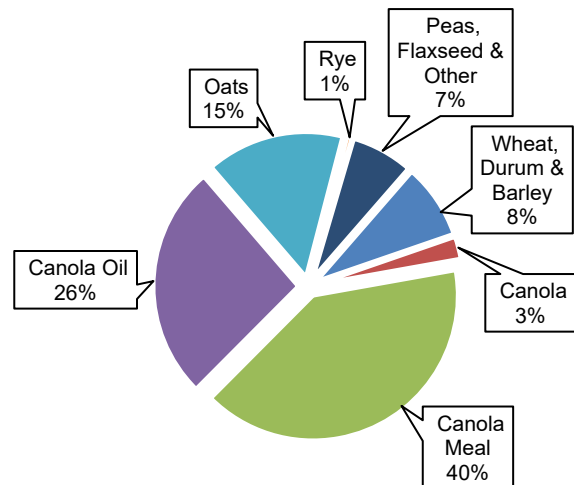
Total YTD - 22.9 MMT

GMP Data Tables 2B-3 to 2B-7

Over 95% of the tonnage directed to destinations within Western Canada moves in covered hopper cars. In the first ten months of the 2021-22 crop year this amounted to nearly 22.9 MMT, down 46.3% from the previous year. Sixty-five 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 49.9%. The west-coast reduction was broadened by a 54.4% decline in Prince Rupert traffic as well, but tempered by a 12.5% gain in Western Domestic volumes. Shipments to Thunder Bay also declined, with volume down 30.4%, while the port of Churchill reported no export grain shipments at all.

## US Destined Grain by Commodity

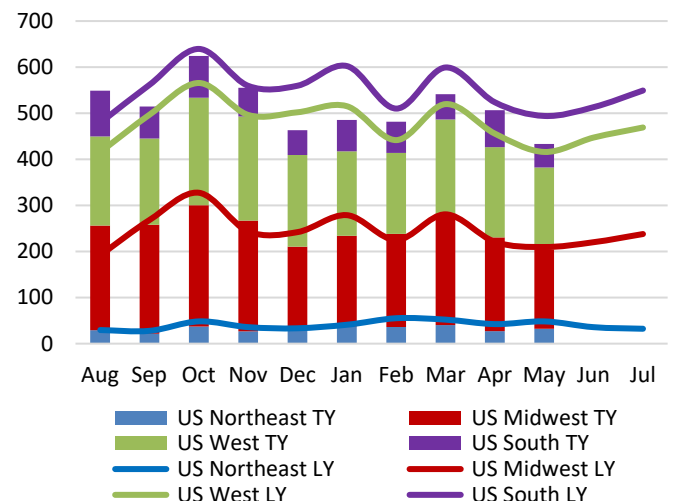


Total YTD - 5.2 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached almost 5.2 MMT in the first ten months of the 2021-22 crop year, down 6.8% 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 fell appreciably in May, averaging 3.2 MMT with producer deliveries declining as stocks-on-farm dwindled and seeding was underway. Overall space in the country system was good. Country stocks utilized 59% of the working capacity of the network. By province, stocks ranged from 47% of working capacity in Manitoba to 61%, 63% and 60% in Saskatchewan, Alberta and British Columbia respectively.

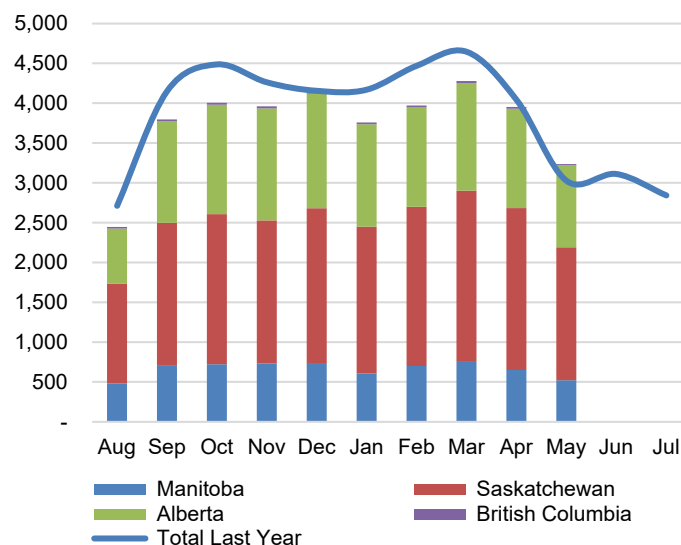
The average days-in-store in the primary-elevator system for the first ten months of the crop year climbed from the same period last year, rising 57.7% to 39.8 days.

Table M-4	MAY 2022	2021-22 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	3,235.8	3,768.0	-6.5%
Average Days in Store	44.5	39.8	57.7%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	16.9	17.5	17.2%
Cycle Time to Eastern Canada	28.9	29.7	38.4%
Cycle Time to US	25.8	27.7	6.8%
Loaded Transit to Western Ports	5.2	7.0	0.7%
Loaded Transit to Eastern Canada	12.6	13.6	27.5%
Loaded Transit to US	10.6	11.8	9.3%
Rail Fleet in Grain Service	10,745	14,854	-34.9%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,241.4	1,136.6	-13.2%
Average Days in Store	19.7	15.8	66.3%
Port Unloads (hopper cars)	13,674	218,096	-45.8%
Terminal Out-of-Car Time	8.5%	19.1%	32.6%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	5.9	9.8	-12.6%

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



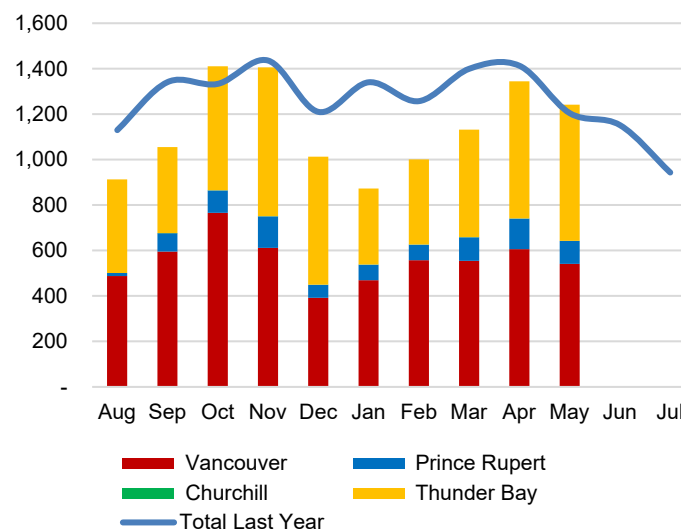
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.8 MMT in store. In August, they pulled back further to average 2.4 MMT before rising to 4.3 MMT in March. By May, they had again retreated to 3.2 MMT. Wheat, including durum, and canola, comprise 69% of the total stock. At 18% of the stock, barley, oats and peas made up much of the balance.

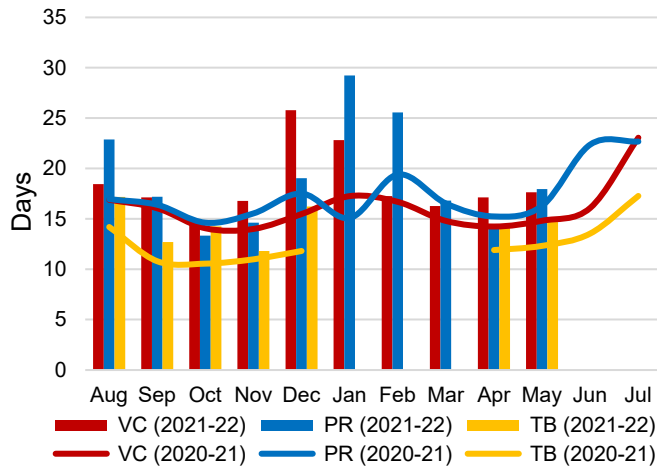
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.2 MMT in May, a decrease from the previous month despite the relatively light export program. Average weekly stock levels fell modestly at all three western ports. Wheat, including durum, and canola, comprise just under 90% of the total stock. In May, western ports utilized just 64% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

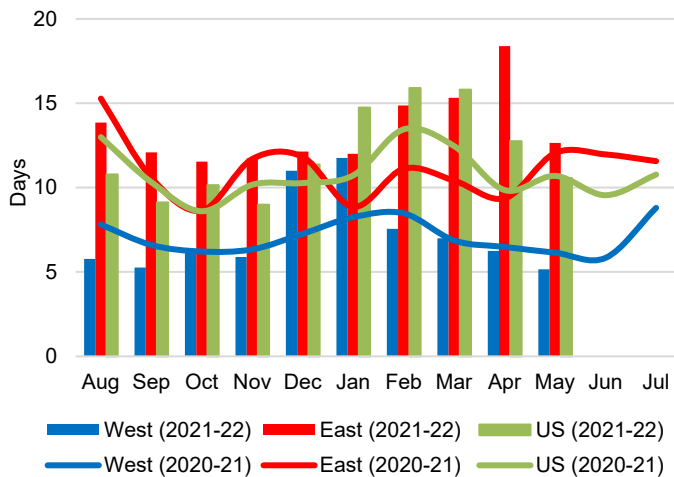


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 17.5 days in the first ten months of the 2021-22 crop year, up 17.2% from the 14.9-day average reported a year earlier. This was due to increases in each of the primary corridors, with the Vancouver average increasing 17.7%; Prince Rupert, 12.1%; and Thunder Bay 25.6%.

The car cycle into Eastern Canada also increased, rising by 38.4%, to an average of 29.7 days from 21.5 days a year earlier. A lesser 6.8% increase was noted in the cycle for US movements, which rose to an average of 27.7 days from 25.9 days the previous year.

## Average Loaded Transit Times (days)

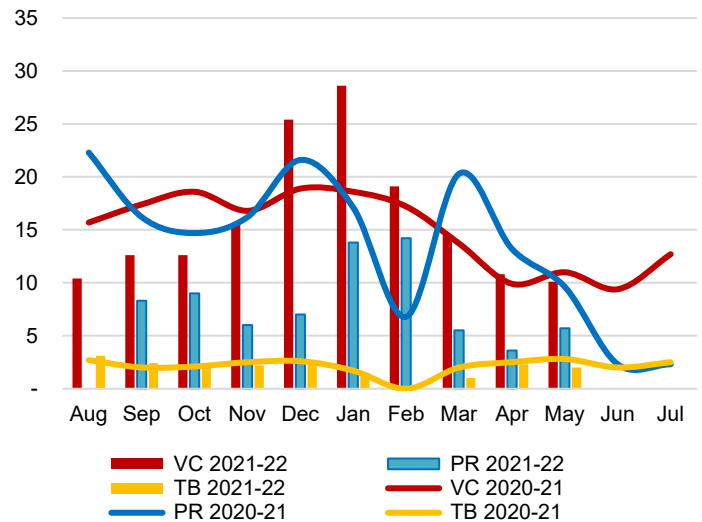


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 7.0 days in the first ten months of the 2021-22 crop year, up 0.7% from the 6.9-day average posted a year earlier. This was driven by increases in the Vancouver and Thunder Bay corridors, which rose by 1.2% and 11.2% respectively. These increases were partially offset by a 6.1% decline in the Prince Rupert corridor average. The average into Eastern Canada rose

by a more substantive 27.5%, to 13.6 days from 10.7 days a year earlier. The average on US-bound traffic rose by 9.3%, to 11.8 days from 10.8 days.

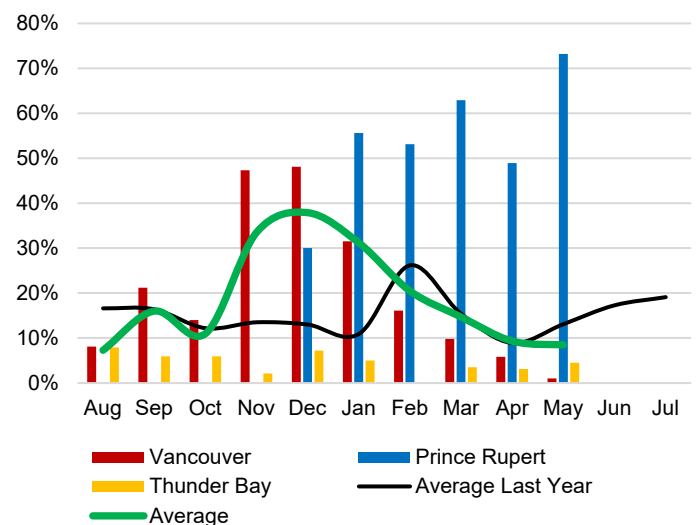
## Average Days in Port per Vessel



GMP Data Table 5D-1

In May, the overall average time vessels were in port waiting and loading grain was 5.9 days, 20.5% less than was the case in May 2021. Juxtaposing the lower year-over-year level, this all-ports' average was virtually unchanged from that seen in the previous month. Both Vancouver and Thunder Bay saw their averages fall marginally from that seen in April, while Prince Rupert's average grew. In May, the average days in port stood at 10.1 for Vancouver, 5.7 for Prince Rupert and 2.0 for Thunder Bay.

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



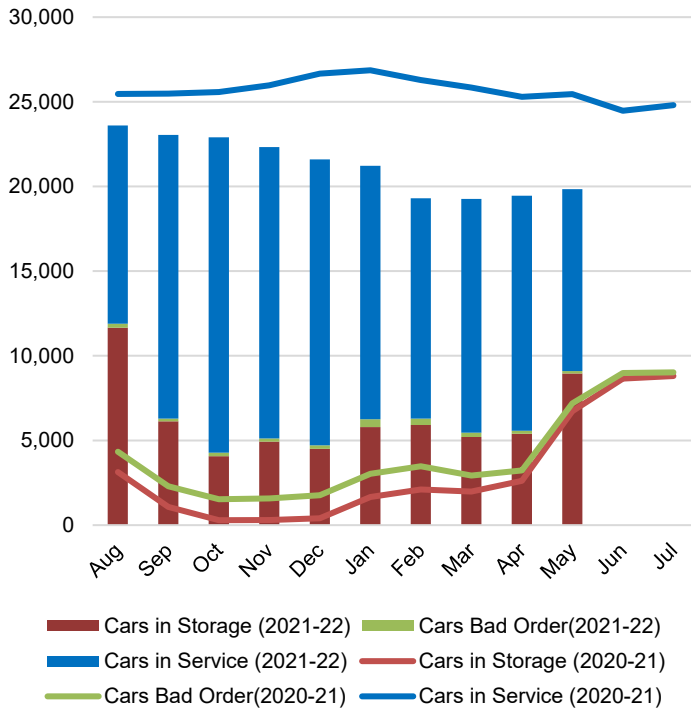
GMP Data Table 5C-5

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 8.5% in May from 9.3% in April. Terminal out-of-car time at Vancouver decreased to 1.0% while rising to 73.2% at Prince Rupert. Thunder Bay registered an increase to 4.5% for time out-of-cars.

## Railway Grain Fleet Size and Utilization



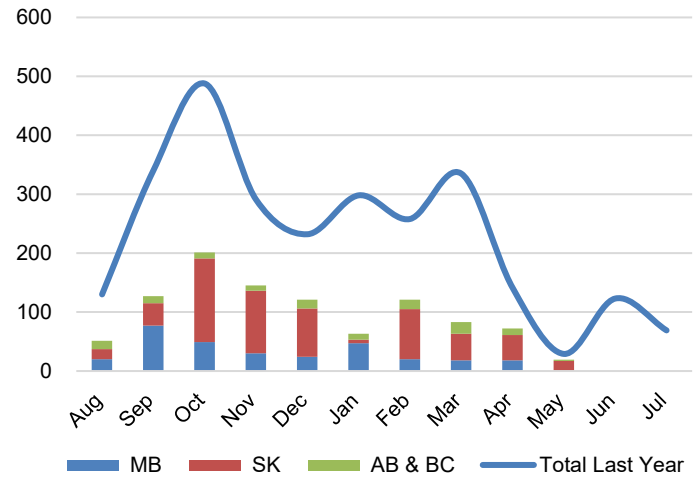
GMP Data Table 3B-2

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 May they saw a pullback to just 10,745 cars in service. The average cars in service for the first ten months of this crop year represents 70% of the total fleet. The balance of the fleet, comprising 30% 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 May 2022 were 34.5% less than those in May a year ago. The previous crop year saw oats shipments constituting 55% of overall producer cars scheduled, while the first ten months of the 2021-22 crop year registered oats increasing to 58% of the overall producer-car number. Other cereal-crop shipments constitute 32% 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

