

## GMP Dashboard

Table M-1	JAN 2023	FEB 2023	2022-23 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	40.2	42.3	39.8	-32.1%
Average Days In Store – Country	25.1	27.9	24.4	-35.3%
Loaded Transit Time	7.0	5.8	5.8	-20.3%
Average Days In Store – Terminal	8.1	8.6	9.6	-29.9%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	4,124.5	3,941.6	30,780.6	45.2%
Railway Shipments (all Western Canada traffic)	4,985.8	4,490.2	34,559.6	49.7%
Western Port Terminal Shipments	3,630.6	2,824.8	24,137.4	51.0%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	10,439	9,987	9,654	23.2%
Total Western Port Car Cycle (days)	15.5	13.3	13.7	-22.7%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	34,268	31,666	252,615	48.8%
Vessel Time in Port (days)	16.1	16.6	10.3	-1.6%

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 decreased by 9.9% in February 2023, to 4.5 MMT from 5.0 MMT in January. Even so, the decline builds on much stronger current-year shipments, which helped lift the year-to-date tonnage to 34.6 MMT, 49.7% more than in the same seven-month period a year earlier. Port shipments for February totaled 2.8 MMT, a 22.2% decline from January. They were 51.0% larger than those in February 2022 when recovery was ongoing from the washouts of road and rail infrastructure that cut off most access to Vancouver months earlier. Contrasting the month-over-month decline in shipments was an increase in the average amount of time vessels spent in port, which grew to 16.6 days in February from 16.1 in January.

## Highlights for February 2023

### Traffic and Movement (page 2)

- Primary-elevator shipments were 30.8 MMT in the first seven months of the 2022-23 crop year, 45.2% more than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first seven months of the 2022-23 crop year totaled 34.6 MMT, up 49.7% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 24.1 MMT in the first seven months of the crop year, up 51.0% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks increased by 1.4% while the average days-in-store fell by 35.3%.
- Average weekly port-terminal stocks increased 4.9% from the same period last year, while average days-in-store fell by 29.9% on a year-over-year basis.
- The preliminary average car cycle for hopper-car movements to Western Canadian ports decreased by 14.2%, to 13.3 days in February from 15.5 days in January. Higher velocities helped reduce the YTD average to 13.7 days, 22.7% below the 17.7 days posted a year earlier. Movements into Eastern Canada also decreased, with the YTD average falling by 13.0% to 23.7 days, while movements into the US fell by a lesser 2.9%, to an average of 25.5 days.
- The year-to-date average for vessel time in port is 10.3 days, 1.6% less than that observed in the previous crop year.
- Port-terminal out-of-car time increased to 23.9% at Vancouver in February, from 7.1% in January. Prince Rupert saw a decline to 12.8% in February, from 14.6% in January. Thunder Bay was largely shut down for the winter season.

## Production and Supply

Statistics Canada's November-survey estimate for 2022 field-crop production in Western Canada stands at 73.8 MMT, a 50.6% increase from 2021's 49.0 MMT harvest. This dramatic increase reflects a solid rebound from the prairie-wide drought that severely reduced production the previous growing season. This estimate represents a 1.4 MMT reduction from the previous model-based estimate recorded at the end of August.

When coupled with July's 3.85 MMT of carry-forward stocks, some 48.9% less than in 2021, the overall grain supply is estimated at 77.7 MMT. This stands 37.3% above the 2021-22 crop year's 56.6-MMT level, marking the return of an abundant grain supply to meet domestic and export demands.

Table M-2	2022	2021	Var. from Last Yr.
<b>Production &amp; Carry Forward (000's tonnes)</b>			
Western Canada Total Production	73,807.4	49,016.9	50.6%
Western Canada On-Farm & Primary-Elevator Carry Forward Stock	3,851.8	7,542.1	-48.9%
<b>Total Grain Supply</b>	<b>77,659.2</b>	<b>56,559.0</b>	<b>37.3%</b>

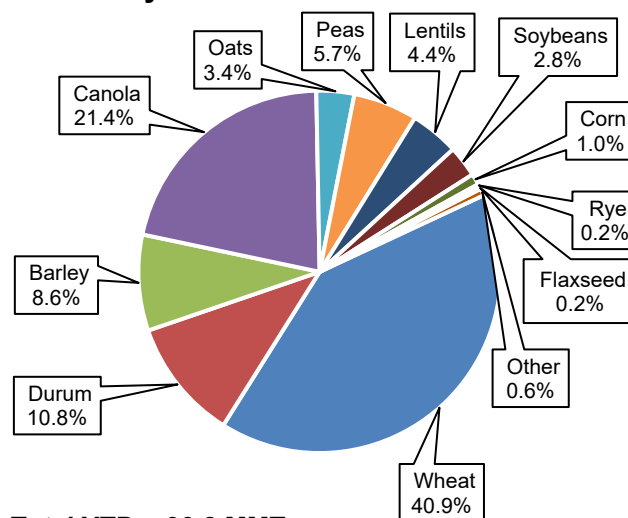
## Traffic and Movement

February producer deliveries declined to average just under 1.0 MMT per week as overall demand lessened with the closure of the Seaway for winter. Average weekly primary-elevator stock levels grew to 4.0 MMT from 3.8 MMT in January, with good space in the elevator system throughout the month.

Table M-3	FEB 2023	2022-23 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	390.8	4,940.8	15.1%
Saskatchewan	2,139.2	15,939.5	64.1%
Alberta	1,389.5	9,693.4	38.3%
British Columbia	22.1	206.9	12.6%
<b>Total</b>	<b>3,941.6</b>	<b>30,780.6</b>	<b>45.2%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	3,382.8	27,544.6	58.7%
Shipments to Eastern Canada	297.5	1,603.8	22.8%
Shipments to US & Mexico	731.5	4,818.6	25.0%
Shipments Western Domestic	78.3	592.6	5.1%
<b>Total</b>	<b>4,490.2</b>	<b>34,559.6</b>	<b>49.7%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	26,802	183,579	58.5%
Prince Rupert	4,574	29,121	83.8%
Churchill	0.0	0.0	n/a
Thunder Bay	290	39,915	4.8%
<b>Total</b>	<b>31,666</b>	<b>252,615</b>	<b>48.8%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	2,437.4	17,537.7	62.5%
Prince Rupert	387.4	2,646.2	85.3%
Churchill	0.0	0.0	n/a
Thunder Bay	0.0	3,953.4	5.0%
<b>Total</b>	<b>2,824.8</b>	<b>24,137.3</b>	<b>51.0%</b>



## Primary Elevator Shipments by Commodity

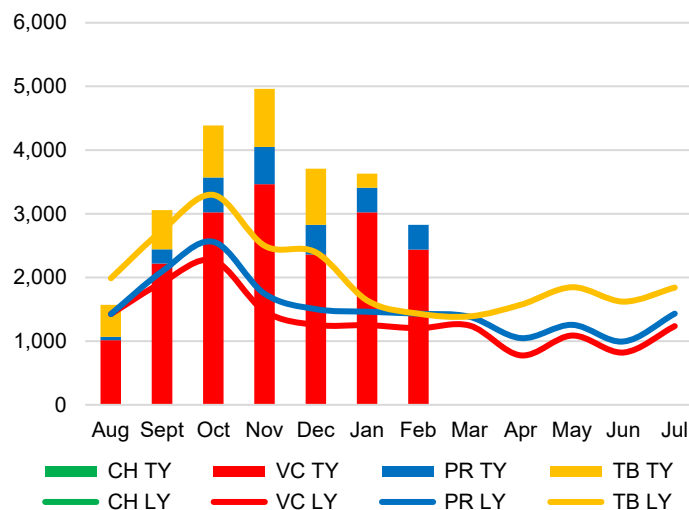


**Total YTD = 30.8 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators grew in the first seven months of the crop year, registering 45.2% greater than in the same period the previous year. Wheat, including durum, and canola continue to constitute the largest proportion of the movement at 73.1%. Movement of peas and lentils contributed 10.1% of the total.

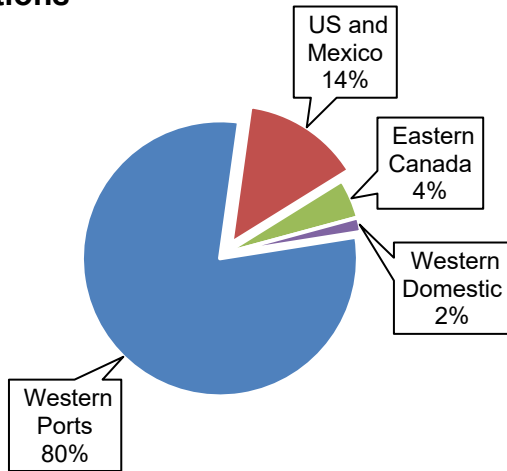
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Bulk grain shipments from western ports have made a solid rebound in the first seven months of the 2022-23 crop year. supply was struggling to recover from the torrential rains that severely damaged transportation infrastructure in the BC lower mainland. Crop year to date, Vancouver was up 62.5%, while Prince Rupert surged to a 85.3% gain. Thunder Bay shipments recorded a more modest year-over-year increase of 5.0%.

## Western Canadian Grain Destinations

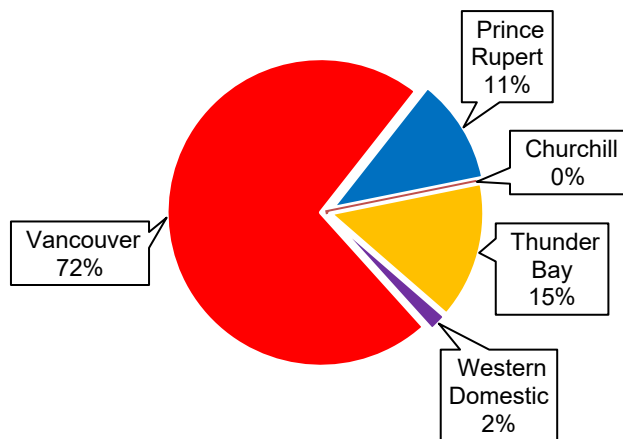


Total YTD = 34.6 MMT

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

Railway grain shipments from Western Canada totaled almost 34.6 MMT in the first seven months of the 2022-23 crop year, a 49.7% increase from the 23.1 MMT handled a year earlier. The majority, about 27.5 MMT, was directed to Western Canadian ports in support of export sales. This represented a 58.7% increase over what had been shipped in the same period the previous year, with the increase supplemented by a 5.1% gain in Western Domestic traffic. A 25.0% increase was noted on movements into Eastern Canada with shipments to the US and Mexico rising by 22.8%.

## Western Canadian Destined Hopper Car Traffic



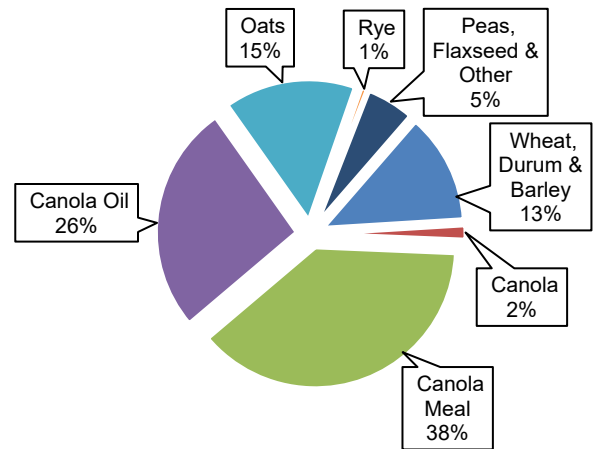
Total YTD - 27.6 MMT

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

Over 95% of the tonnage directed to destinations within Western Canada moves in covered hopper cars. In the first seven months of the 2022-23 crop year this amounted to 27.6 MMT, up 58.7% from the previous year. Seventy-two 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 rose by 71.9%. The west-coast increase was broadened by an 88.0% gain in Prince Rupert volumes as well as a 4.9% increase in Western Domestic traffic. Shipments to Thunder Bay also rose, albeit by a lesser 10.9%, while the port of Churchill reported no export grain shipments at all.

## US Destined Grain by Commodity

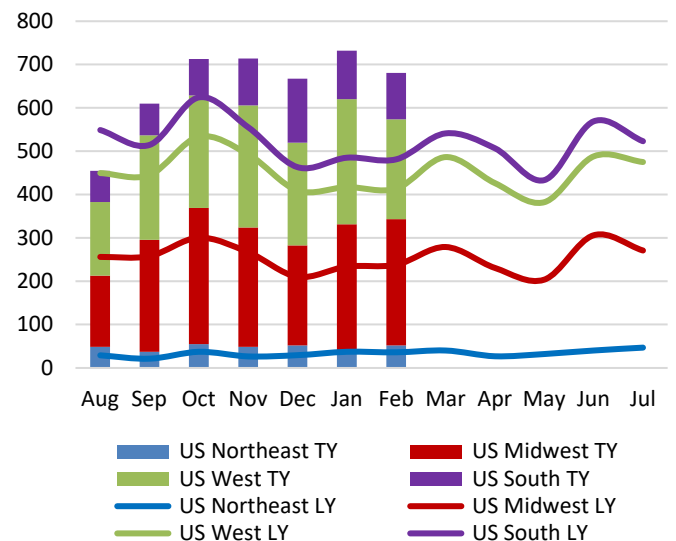


Total YTD - 4.6 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached almost 4.6 MMT in the first seven months of the 2022-23 crop year, up 24.4% from the tonnage moved in the same period a year earlier. Over 75% 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

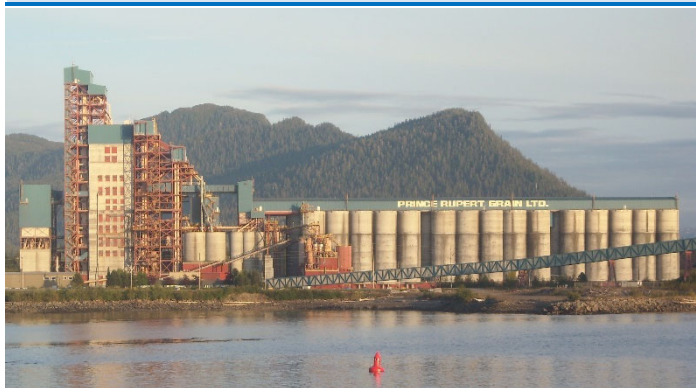
## System Efficiency and Performance

Primary elevator stocks increased in February, averaging 4.0 MMT as producer deliveries maintained a steady pace with relatively good winter operating conditions. Overall space in the country system was good. Country stocks utilized 73% of the working capacity of the network. By province, stocks ranged from 71% and 72% of working capacity in Manitoba and Saskatchewan respectively, to 77% in Alberta, and 88% in British Columbia.

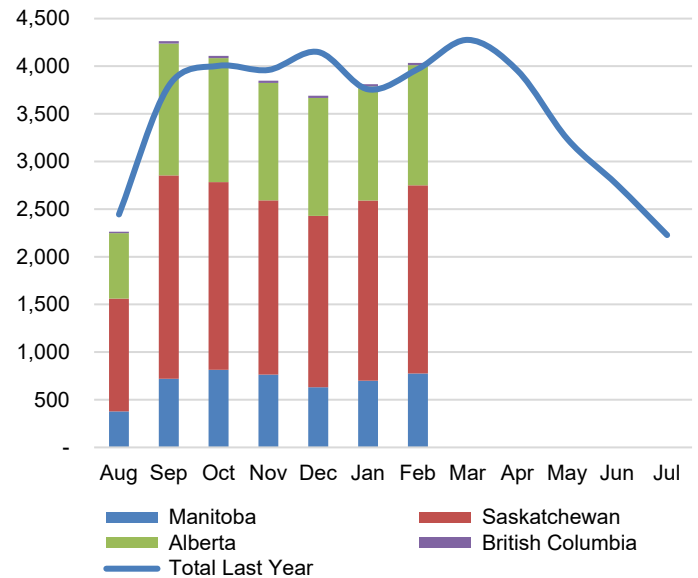
The average days-in-store in the primary-elevator system for the first seven months of the crop year declined from the same period last year, falling 35.3% to 24.4 days.

Table M-4	FEB 2023	2022-23 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	4,033.6	3,671.5	1.4%
Average Days in Store	27.9	24.4	-35.3%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	13.3	13.7	-22.7%
Cycle Time to Eastern Canada	20.2	23.7	-13.0%
Cycle Time to US	26.1	25.5	-2.9%
Loaded Transit to Western Ports	5.8	5.8	-20.3%
Loaded Transit to Eastern Canada	8.8	10.8	-13.9%
Loaded Transit to US	11.0	10.2	-7.5%
Rail Fleet in Grain Service	19,045	18,803	19.8%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,171.2	1,147.6	4.9%
Average Days in Store	8.6	9.6	-29.9%
Port Unloads (hopper cars)	31,666	252,615	48.8%
Terminal Out-of-Car Time	22.6%	13.1%	-39.9%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	16.6	10.3	-1.6%

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



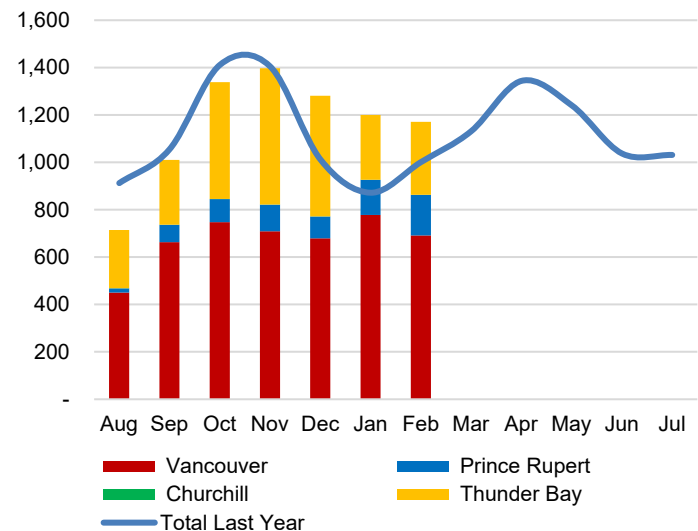
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.2 MMT in store. They grew to average 4.3 MMT in September before retreating to 3.7 in December and then advancing again to 4.0 MMT by February. Wheat, including durum, and canola, comprise 71% of the total stock. At 20% of the stock, barley, oats and peas made up much of the balance.

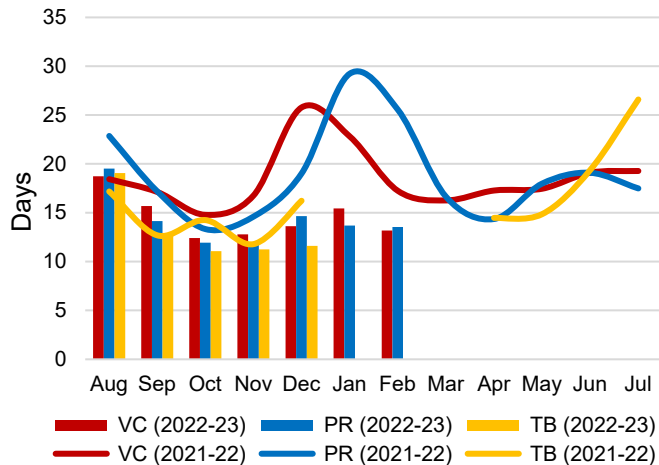
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.2 MMT in February, a modest decrease from the previous month as the GHTS faced winter operating conditions. Stocks declined at Vancouver, while growing at Prince Rupert and Thunder Bay. Wheat, including durum, and canola, comprise just under 76% of the total stock. In February, western ports utilized just 61% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

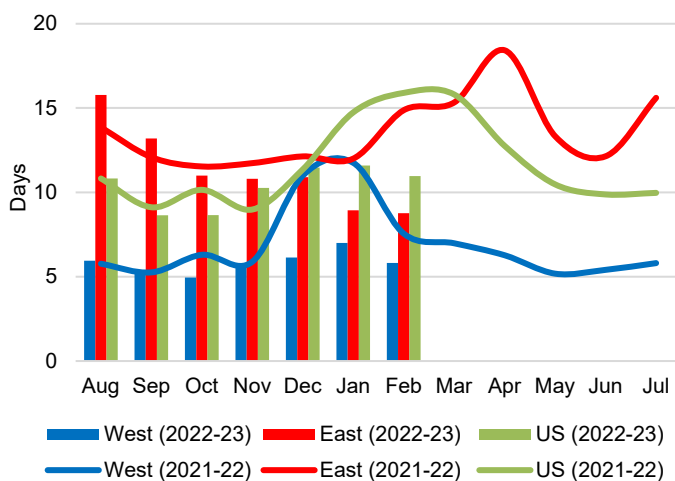


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 13.7 days in the first seven months of the 2022-23 crop year, down 22.7% from the 17.8-day average reported a year earlier. This was largely the result of decreases in the Vancouver and Prince Rupert corridors, with car-cycle averages falling by 23.5% and 31.3% respectively. The Thunder Bay average fell by a lesser 17.8%.

Similarly, the car cycle into Eastern Canada also fell, albeit by a lesser 13.0%, to an average of 23.7 days from 27.2 days a year earlier. A marginal 2.9% decrease was noted in the cycle for US movements, which fell to an average of 25.5 days from 26.3 days the previous year.

## Average Loaded Transit Times (days)

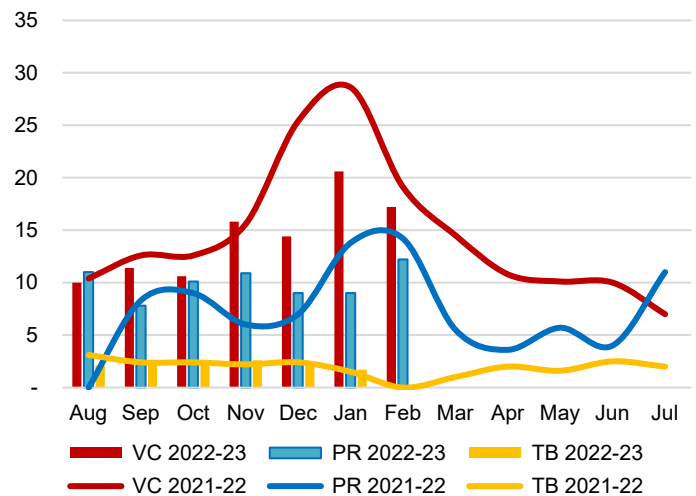


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 5.8 days in the first seven months of the 2022-23 crop year, down 20.3% from the 6.4-day average posted a year earlier. This was primarily driven by a 21.0% decrease in the Vancouver-corridor average but supported by significant decreases in the Prince Rupert and Thunder Bay corridors as well, which fell by

33.5% and 14.7% respectively. The average into Eastern Canada fell by a lesser 13.9%, to 10.8 days from 12.5 days a year earlier. The average on US-destined traffic fell by 7.5%, to 10.2 days from 11.0 days.

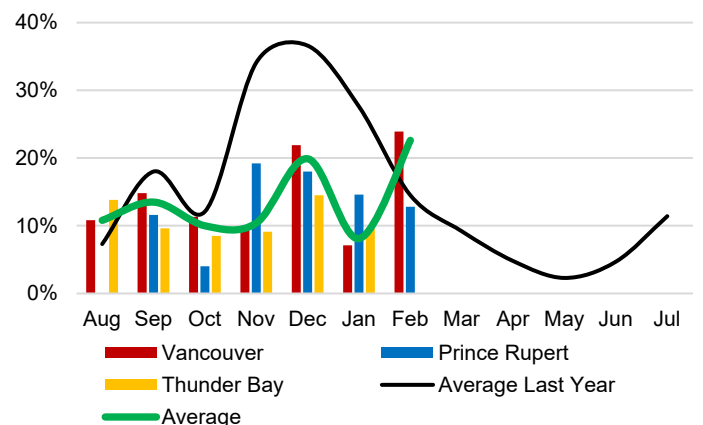
## Average Days in Port per Vessel



GMP Data Table 5D-1

In February, the overall-average time vessels were in port waiting and loading grain was 16.6 days, 9.2% less than was the case in February 2022. The average fell at Vancouver and rose at Prince Rupert from that seen in January. In February, the average days in port stood at 17.2 for Vancouver and 12.2 for Prince Rupert. Thunder Bay was closed to navigation.

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



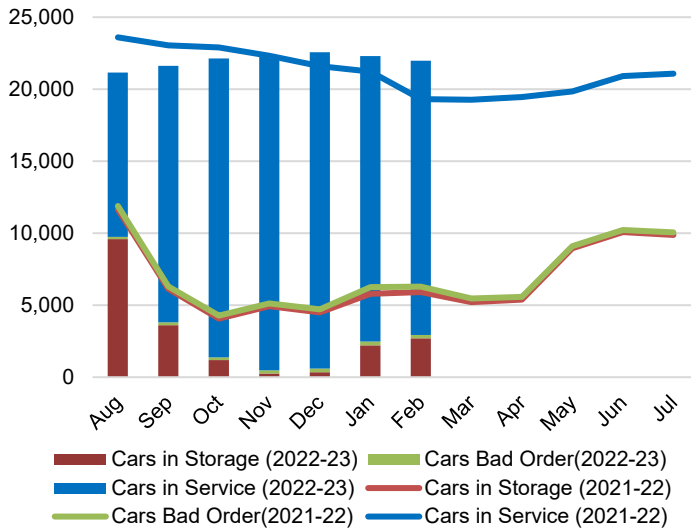
GMP Data Table 5C-5

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 climbed to 22.6% in February, up from 8.1% in January. Terminal out-of-car time

increased to 23.9% at Vancouver while falling to 12.8% at Prince Rupert. Thunder Bay terminals were largely closed in February.

## Railway Grain Fleet Size and Utilization

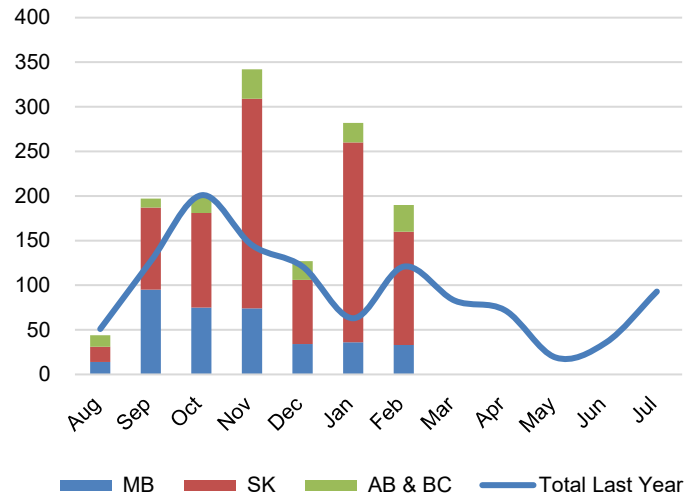


GMP Data Table 3B-2

During times of heavy demand, nearly the entire hopper-car fleet is placed into 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 2021-22 crop year as the weekly number of cars in service declining to a low of 10,693 in June 2022, with roughly half the fleet then having been placed in storage. A modest increase in the serviceable-car count is seen by August 2022, rising to 11,413 followed by a jump to 21,968 in December. By February, the cars in service retracted to average 19,045. In February, 87% of the overall fleet was in service to address the shipping demands for western grain, with only a modest number of cars being reported in either storage or bad order status.

## Producer Cars

### Producer Cars Scheduled by Province



GMP Data Table 6B-2

Producer car shipments scheduled for February 2023 were 57.0% more than those in February a year earlier. The previous crop year saw oats shipments comprising 54% of overall producer cars scheduled, while the first seven months of the 2022-23 crop year registered oats losing ground, at only 47% of the overall producer-car number. Wheat and durum constitute a lesser 37% of the year-to-date 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

