



## GMP Dashboard

Table M-1	JAN 2025	FEB 2025	2024-25 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	42.1	52.9	41.2	-1.2%
Average Days In Store – Country	24.8	33.3	24.2	-5.5%
Loaded Transit Time	6.6	7.0	6.1	-1.2%
Average Days In Store – Terminal	10.7	12.6	10.9	-3.5%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	4,868.0	3,387.0	31,222.4	9.8%
Railway Shipments (all Western Canada traffic)	4,907.5	3,777.2	35,108.5	11.0%
Western Port Terminal Shipments	3,295.0	2,557.3	25,258.4	14.4%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	9,438	9,657	9,986	15.9%
Total Western Port Car Cycle (days)	16.6	15.5	14.5	-5.5%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	38,684	25,612	261,692	13.4%
Vessel Time in Port (days)	14.5	18.0	10.8	10.2%

*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 railway grain shipments decreased by 23.0% in February 2025, to 3.8 MMT from the 4.9 MMT reported in January. Despite a brief strike-related interruption to railway service, a comparatively stronger movement has lifted the year-to-date tonnage by 11.0%, to 35.1 MMT from 31.6 MMT a year earlier. Port shipments for February totaled 2.6 MMT, a 22.4% decrease from January. Year-to-date tonnage, at 25.3 MMT, is 14.4% more than in the previous crop year. The average amount of time vessels spent in port rose to 18.0 days in February from the 14.5 days registered in January, owing in part to the closure of the Port of Thunder Bay which regularly posts lower time in port than the west coast counterparts.

## Highlights for February 2025

### Traffic and Movement (page 2)

- Primary-elevator shipments were 31.2 MMT in the first seven months of the 2024-25 crop year, 9.8% 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 2024-25 crop year totaled slightly over 35.1 MMT, up 11.0% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 25.3 MMT in the first seven months of the crop year, up 14.4% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks grew by 5.7% while the average days-in-store fell by 5.5%.
- Average weekly port-terminal stocks were increased by 4.1% from the same period last year, while average days-in-store fell by 3.5% on a year-over-year basis.
- The preliminary average car cycle for hopper-car movements to Western Canadian ports in February 2025 fell by 6.6%, to 15.5 days from 16.6 days in January. Comparatively better velocities also helped lower the year-to-date average to 14.5 days, 5.5% below the 15.3 days posted a year earlier. Conversely, the average for movements into Eastern Canada rose by 6.5% to 23.4 days, while the average for movements into the US fell by 7.6%, to 25.2 days.
- The year-to-date average for vessel time in port is 10.8 days, 10.2% more than that observed in the previous crop year.
- Port-terminal out-of-car time increased to 33.4% at Vancouver in February, from 19.0% in January. Prince Rupert saw out-of-car time jump to 36.4% for the month from 11.7% in January. Thunder Bay was closed during February.

## Production and Supply

Statistics Canada's November producer-survey estimate for 2024 field-crop production in Western Canada stands at 71.5 MMT, a 3.4% increase from 2023's 69.2 MMT harvest. While overall, this estimate is little changed from the August model-based estimate, the canola projection was reduced by over 1.1 MMT. The 2024 growing season began with extremely dry conditions following below-normal precipitation during the previous fall and winter. Despite cool weather, significant rainfall in late May and June fostered optimism for a bountiful crop. Hot dry conditions across the prairies in July tempered projections and the ensuing harvest.

When coupled with July's 7.0 MMT of carry-forward stocks, some 10.3% less than in 2023, the overall grain supply is estimated at 78.5 MMT. This is just 2.0% greater than the 2023-24 crop year's 77.0-MMT level, heralding relatively good supplies to meet domestic and export demands.



Table M-2	2024	2023	Var. from Last Yr.
<b>Production &amp; Carry Forward (000's tonnes)</b>			
Western Canada Total Production - Preliminary	71,498.3	69,163.7	3.4%
Western Canada On-Farm & Primary-Elevator Carry Forward Stock	7,040.3	7,846.4	-10.3%
<b>Total Grain Supply</b>	<b>78,538.6</b>	<b>77,010.1</b>	<b>2.0%</b>

## Traffic and Movement

Producer deliveries declined from January to a weekly average of just over 0.9 MMT. Weekly primary-elevator stocks rose to an average of 4.2 MMT in February, resulting in limited space in Saskatchewan elevators at the end of the month.

Table M-3	FEB 2025	2024-25 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	446.7	5,394.3	-2.0%
Saskatchewan	1,620.7	15,975.6	15.8%
Alberta	1,298.2	9,698.0	8.2%
British Columbia	21.4	160.5	-6.2%
<b>Total</b>	<b>3,387.0</b>	<b>31,228.4</b>	<b>9.8%</b>

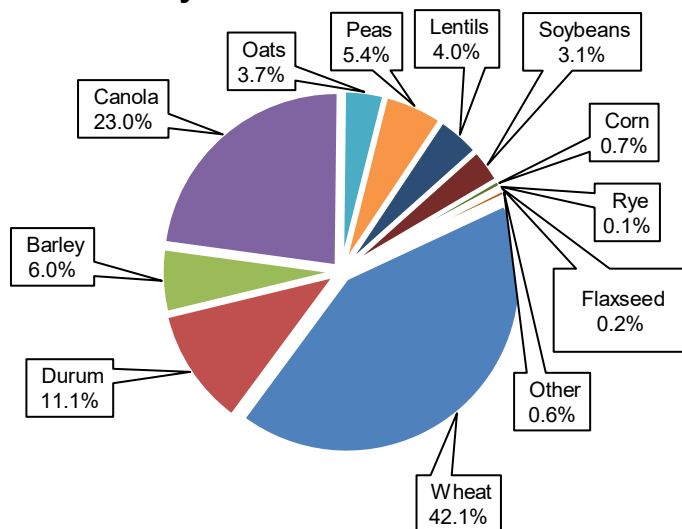
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	2,834.9	27,865.5	12.1%
Shipments to Eastern Canada	242.0	1,589.2	14.0%
Shipments to US & Mexico	644.7	5,130.5	7.8%
Shipments Western Domestic	55.6	523.4	-14.5%
<b>Total</b>	<b>3,777.2</b>	<b>35,108.5</b>	<b>11.0%</b>

<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	21,893	187,094	9.8%
Prince Rupert	3,517	29,233	50.9%
Churchill	0.0	0.0	n/a
Thunder Bay	202	45,365	10.7%
<b>Total</b>	<b>25,612</b>	<b>261,692</b>	<b>13.4%</b>

<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	2,243.4	17,853.0	10.4%
Prince Rupert	311.6	2,798.5	51.7%
Churchill	0.0	0.0	n/a
Thunder Bay	2.3	4,606.9	13.2%
<b>Total</b>	<b>2,557.3</b>	<b>25,258.4</b>	<b>14.4%</b>



## Primary Elevator Shipments by Commodity

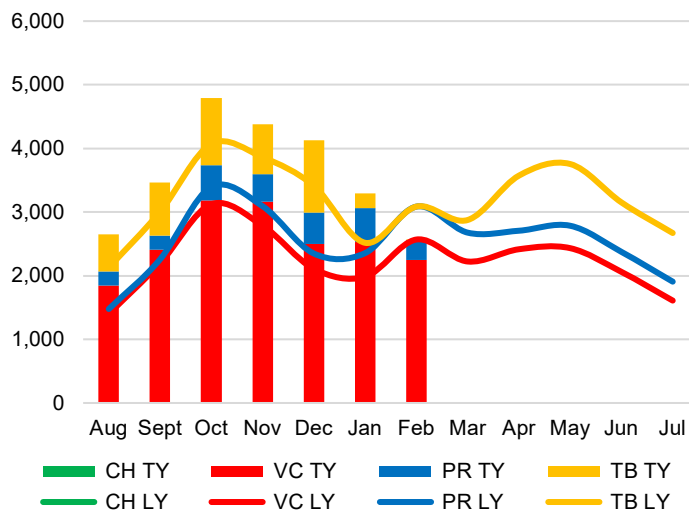


**Total YTD = 31.2 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators grew in the first seven months of the crop year, registering 9.8% more than in the same period the previous year. Wheat, including durum, and canola constitute the largest proportion of the movement at 76.2%. Shipments of peas and lentils contributed 9.4% of the total.

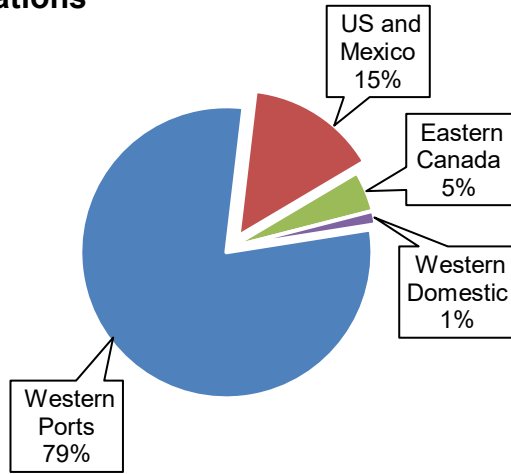
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Overall bulk grain shipments from western ports have increased 14.4% on a year-over-year basis. Crop year to date, Vancouver shipments are up 10.4% and Thunder Bay shipments are up 13.2%. Prince Rupert shipments saw an increase of 51.7% over the previous crop year's subdued level.

## Western Canadian Grain Destinations

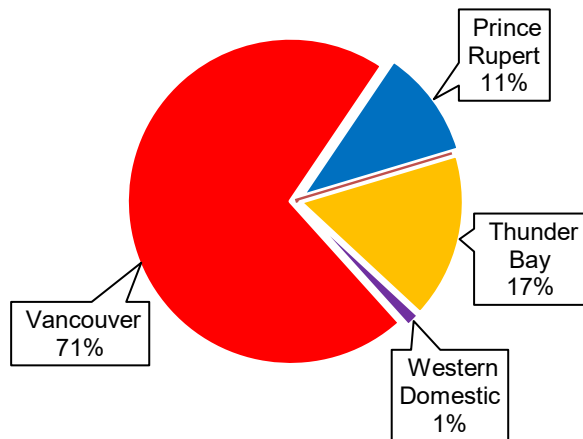


Total YTD = 35.1 MMT

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

Railway grain shipments from Western Canada totaled slightly over 35.1 MMT in the first seven months of the 2024-25 crop year, an 11.0% increase over the 31.6 MMT handled in the same period a year earlier. The majority, about 27.9 MMT, was directed to Western Canadian ports, which saw a 12.1% gain in volume. This was supported by a 14.0% increase in shipments to Eastern Canada, and a 7.8% gain on movements into the US and Mexico. Conversely, Western Domestic volumes fell by 14.5%.

## Western Canadian Destined Hopper Car Traffic



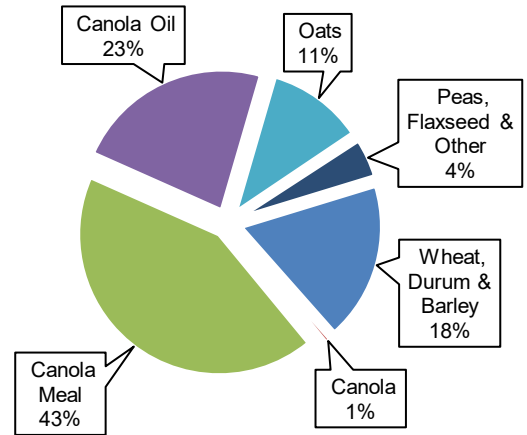
Total YTD = 27.3 MMT

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 seven months of the 2024-25 crop year this amounted to over 27.3 MMT, up 9.9% from the previous year. Seventy-one 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 6.5%. This upturn in west-coast traffic was supported by a significantly greater 39.5% increase in Prince Rupert volumes. Similarly, there was a 14.7% gain in shipments to Thunder Bay. These were only marginally offset by a 25.8% decline in Western Domestic traffic.

## US Destined Grain by Commodity

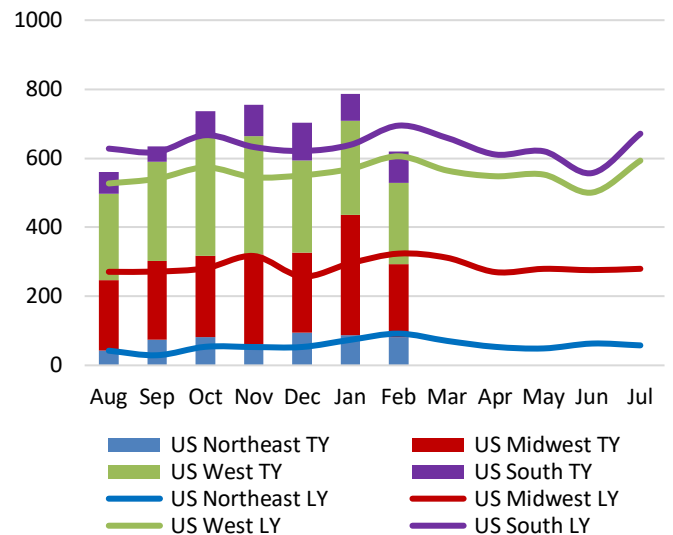


Total YTD = 4.8 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached slightly under 4.8 MMT in the first seven months of the 2024-25 crop year, up 6.6% from that moved in the same period a year earlier. Just under 78% of these shipments were directed into the US Midwest and West, with canola and canola products being the dominant commodities.

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



GMP Data Table 2B-18

## System Efficiency and Performance

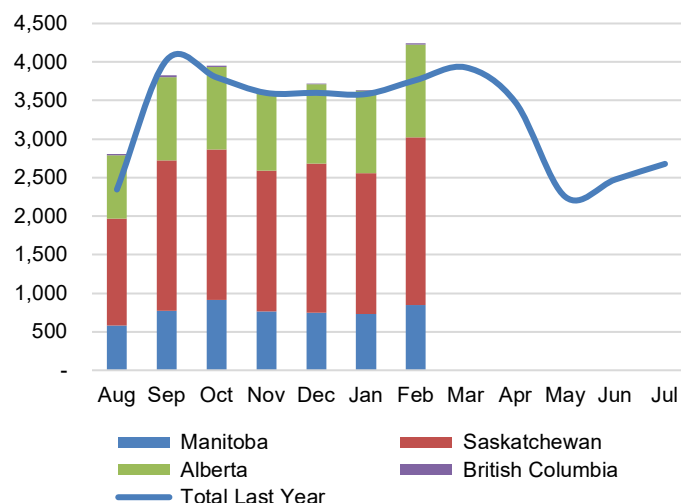
Primary elevator stocks grew in February, averaging 4.2 MMT, up 16.6% from January. Overall space in the country system was good, though space was limited in Saskatchewan at the close of the month. Country stocks utilized 80% of the working capacity of the network. By province, stocks ranged from 74% and 75% in Alberta and British Columbia respectively, to 80% in Manitoba and 84% in Saskatchewan.

The average days-in-store in the primary-elevator system for the first seven months of the crop year decreased from the same period last year, falling 5.5% to 24.2 days.

Table M-4	FEB 2025	2024-25 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	4,244.4	3,694.2	5.7%
Average Days in Store	33.3	24.2	-5.5%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	15.5	14.5	-5.5%
Cycle Time to Eastern Canada	24.0	23.4	6.5%
Cycle Time to US	27.3	25.2	-7.6%
Loaded Transit to Western Ports	7.0	6.1	-1.2%
Loaded Transit to Eastern Canada	10.3	10.2	1.8%
Loaded Transit to US	11.5	10.2	-6.5%
Rail Fleet in Grain Service	22,234	21,907	0.7%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,095.2	1,255.0	4.1%
Average Days in Store	12.6	10.9	-3.5%
Port Unloads (hopper cars)	25,612	261,692	13.4%
Terminal Out-of-Car Time	33.8%	14.7%	-2.0%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	18.0	10.8	10.2%



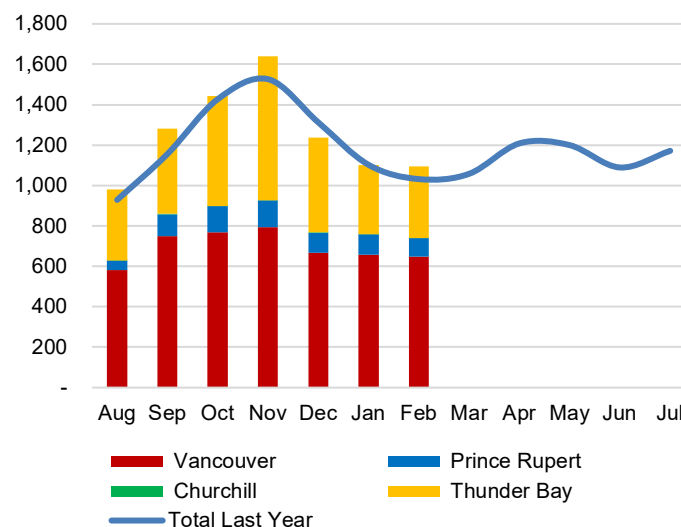
## Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.7 MMT in-store. They grew modestly in August to 2.8 MMT and to nearly 4.0 MMT in October before retreating to 3.6 MMT by January. In February, they advanced again to 4.3 MMT as outward rail shipments lagged. Wheat, including durum, and canola, comprise 71% of the total stock. At 16% of the stock, barley, oats and peas made up much of the balance.

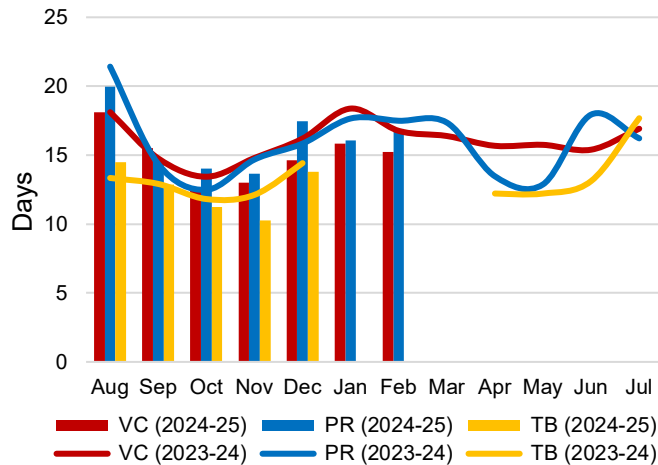
## Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged just under 1.1 MMT in February, even with those in-store during January. Wheat, including durum, and canola, comprise 78% of the total stock. In February, western ports utilized just 57% of their overall working capacity.

## Railway Cycle Times to Western Ports (days)

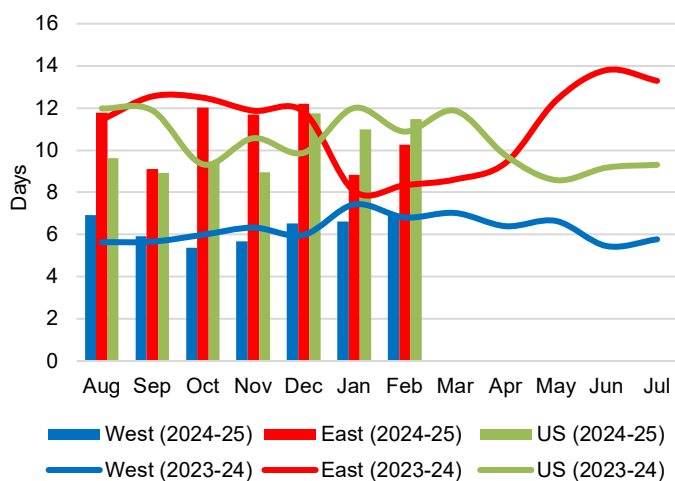


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 14.5 days in the first seven months of the 2024-25 crop year, down 5.5% from the 15.3-day average reported a year earlier. This result was largely shaped by a 6.9% decrease in the Vancouver corridor average along with a 1.5% reduction in the average for Thunder Bay, and a marginal 0.3% decline in the Prince Rupert average.

This was accompanied by a 6.5% increase in the car cycle for movements into Eastern Canada, which rose to an average of 23.4 days from 22.0 days a year earlier. A 7.6% decrease was noted in the cycle for US movements, which fell to an average of 25.2 days from 27.3 days the previous year.

## Average Loaded Transit Times (days)

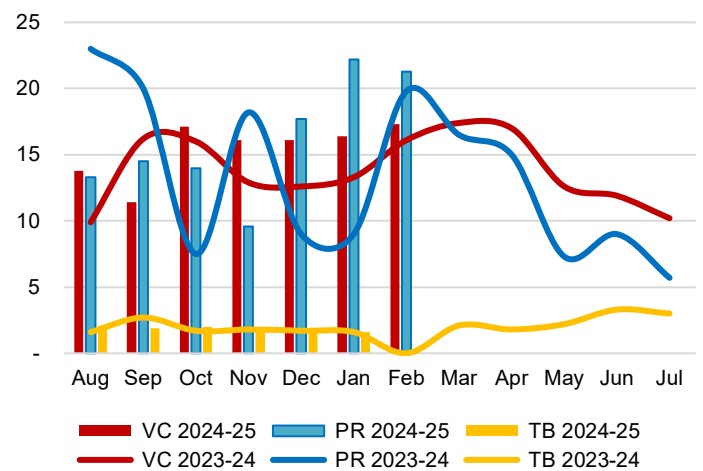


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 6.1 days in the first seven months of the 2024-25 crop year, down 1.2% from a similar 6.2-day average posted the previous year. This result was largely driven by a 2.5% reduction in the Vancouver-corridor average and supported by a 0.3% decline in the Thunder Bay corridor average. Conversely, the

Prince Rupert average rose by 13.4%. The average on US-destined traffic also declined, albeit by a more substantive 6.5%, to 10.2 days from 10.9 days. Running counter to this was the average into Eastern Canada, which rose by 1.8%, to 10.2 days from 10.0 days a year earlier.

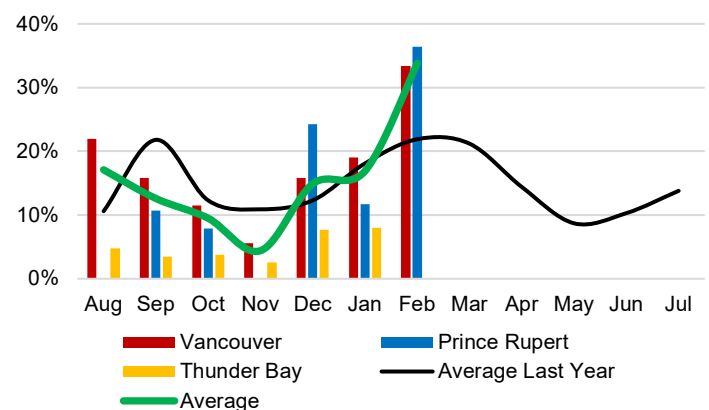
## Average Days in Port per Vessel



GMP Data Table 5D-1

In February, the overall-average time vessels were in port waiting and loading grain was 18.0 days, 8.0% more than was the case in February 2024. The month-over-month average rose to 17.3 days for Vancouver, while decreasing to 21.3 days for Prince Rupert.

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

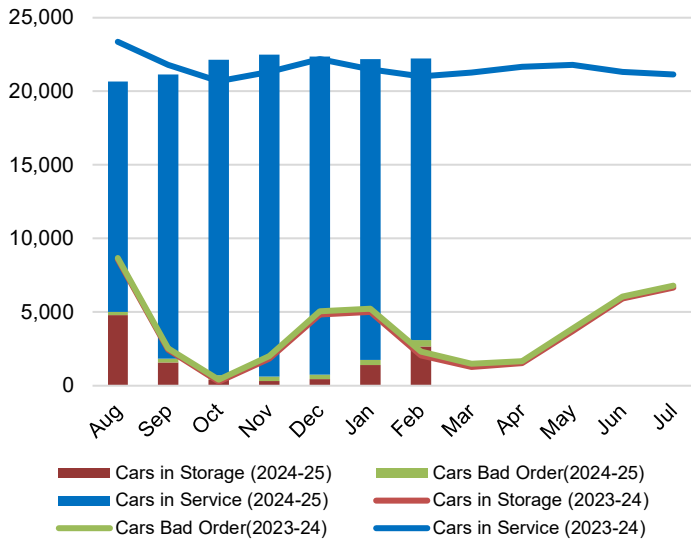


GMP Data Table 5C-5

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).

The aggregate measure for all ports soared to 33.8% in February, the highest seen all crop year. Terminal out-of-car time increased to 33.4% at Vancouver and to 36.4% at Prince Rupert. Thunder Bay terminals were closed for winter.

## Railway Grain Fleet Size and Utilization

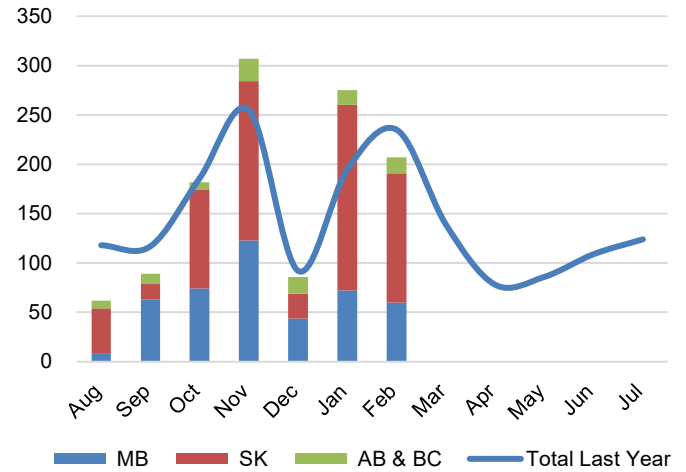


GMP Data Table 3B-2

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 2023-24 crop year as the weekly number of cars in service declined to 14,457 in July 2024, with about 32% of the fleet then having been placed in storage. A moderate decrease in the serviceable-car count is seen in the February 2025 weekly average, which dropped to 19,132 from January's 20,432. In February, 86% of the overall fleet was in service to address the shipping demands for western grain, with the balance 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 2025 were 11.9% less than those in February a year earlier. Year to date, oats comprise 50% of the movement, measurably greater than the 41% shipped the previous crop year. Wheat and durum comprise just 31% of the year-to-date total. The majority of producer cars, over 54%, thus far in the crop year have been shipped to the United States.



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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