

## GMP Dashboard

Table M-1	JUL 2017	AUG 2017	2017-18 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	46.4	46.4	46.4	29.6%
Average Days-In-Store – Country	30.3	26.7	26.7	34.2%
Loaded Transit Time	5.7	6.2	6.2	31.0%
Average Days-In-Store – Terminal	10.4	13.5	13.5	20.5%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	2,926.9	3,604.2	3,604.2	3.5%
Railway Shipments (all Western Canada traffic)	3,520.8	3,532.8	3,532.8	0.7%
Western Port Terminal Shipments	2,760.5	2,633.2	2,633.2	5.2%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	8,964	8,199	8,199	8.0%
Total Western Port Car Cycle (days)	15.9	16.6	16.6	21.9%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	27,065	30,048	30,048	-3.7%
Vessel Time in Port (days)	9.9	9.5	9.5	39.7%

- Order fulfillment 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 July 31).

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

Total Western Canadian rail shipments in the first month of the 2017-18 crop year rose by 0.7%, keeping pace with the start of the previous crop year. Western port shipments for August totaled 2.6 MMT, a 4.6% decrease from July volumes, but 5.2% greater than August of 2016. Despite it being traditionally one of the slowest shipping periods of the year, Thunder Bay/St. Lawrence Seaway as well as West Coast demand held relatively steady. Accompanying the modest drop in shipments, is a 9.5-day average in the amount of time vessels spent in port in August, down from July's 9.9-day average.

Warm dry conditions across the prairie grain belt allowed an early start to the 2017 harvest. Progress was most advanced in Manitoba and the southern territory. In Manitoba, depending on the region, cereals were approximately 50 to 70% harvested by the end of August. Canola swathing and combining was progressing well. Saskatchewan crops were approximately 35% harvested and

Alberta crops approximately 20% in the bin. Early reports were of generally good quality for the crops harvested.

## Highlights for August 2017

### Traffic and Movement (page 2)

- Primary-elevator shipments were 3.6 MMT in the first month of the 2017-18 crop year, 3.5% more than last year.
- Total rail shipments (including primary/process elevators & producer cars) to all destinations from Western Canada reached 3.5 MMT in August 2017, up 0.7% from that handled in the opening month of the previous crop year.
- Crop year-to-date shipments from Western Canadian ports totaled 2.8 MMT, up 5.2% from the same period last year.

### System Efficiency and Performance (page 3)

- Average weekly stocks in the country increased by 41.6% from the same period last year. The average days-in-store was up 34.2%.
- Average weekly port-terminal stocks increased 26.4% from the same period last year, while average days-in-store rose 20.5%.
- Railcar cycle times moved sharply higher in August 2017, averaging 16.6 days to western ports from the previous years average of 14.1 days; 25.9 days to eastern Canada from 20.4 days; and 31.4 days to the US from 24.8 days.
- The year-to-date average for vessel time in port is 9.5 days, a 39.7% increase from that observed in the previous crop year.
- Port-terminal out-of-car time fell from 12.8% in July to 10.8% in August at Vancouver, and from 2.7% in July to 0.3% in August at Prince Rupert while climbing from 5.6% to 7.4% at Thunder Bay.

## Production and Supply

The preliminary estimate from Statistics Canada's July survey for 2017 crop production in Western Canada stands at 63.0 MMT, a 13.2% decrease from the 2016 harvest, but still registering as one of the larger crops in Western Canadian history. The July survey was undertaken during the driest part of the growing season and will be updated with subsequent estimates as the 2017 harvest progresses. There will be an update from Stats Canada's model-based estimate in the September report.

Coupled with carry-forward stock of 8.6 MMT in 2017, 14.7% more than in 2016, the overall western grain supply is estimated to be 71.6 MMT, 10.6% less than that of the previous year.

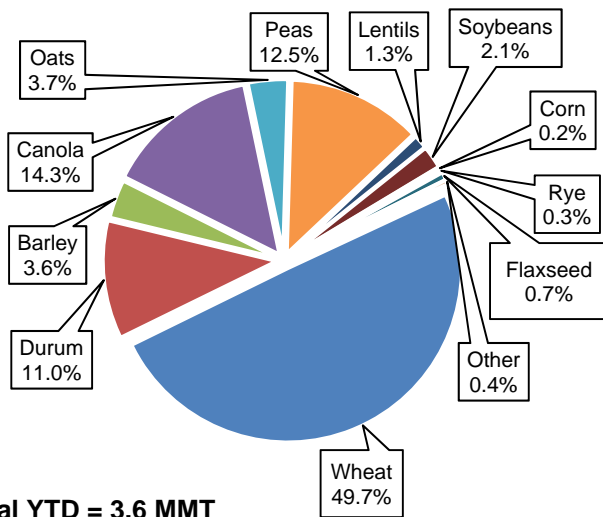
Production & Carry Over (000's tonnes) Table M-2	2017	2016	Var. from Last Year
Western Canada Total Production – Preliminary*	62,977.6*	72,580.9	-13.2%
Western Canada On Farm & Primary Elevator Carry Forward Stock	8,605.0	7,504.9	14.7%
<b>Total Grain Supply</b>	<b>71,582.6*</b>	<b>80,085.8</b>	<b>-10.6%</b>

# Traffic and Movement

With harvest underway, producer deliveries steadily built during August, averaging just above 0.8 MMT per week for the month. Average weekly primary elevator stock levels decreased to 2.9 MMT, while continuing to provide adequate supply for the new crop year shipping program.

Table M-3	AUG 2017	2017-18 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	806.1	806.1	15.8%
Saskatchewan	1,530.0	1,530.0	-10.1%
Alberta	1,257.7	1,257.7	18.4%
British Columbia	10.4	10.4	-51.6%
<b>Total</b>	<b>3,604.2</b>	<b>3,604.2</b>	<b>3.5%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	2,692.3	2,692.3	-3.8%
Shipments to Eastern Canada	161.1	161.1	31.3%
Shipments to US & Mexico	622.4	622.4	14.1%
Shipments Western Domestic	56.9	56.9	31.3%
<b>Total</b>	<b>3,532.8</b>	<b>3,532.8</b>	<b>0.7%</b>
<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	20,014	20,014	6.4%
Prince Rupert	3,589	3,589	-15.5%
Thunder Bay	6,445	6,445	-20.9%
<b>Total</b>	<b>30,048</b>	<b>30,048</b>	<b>-3.7%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	1,705.4	1,705.4	12.0%
Prince Rupert	348.9	348.9	11.5%
Churchill	0	0	n/a
Thunder Bay	578.9	578.9	-13.3%
<b>Total</b>	<b>2,633.2</b>	<b>2,633.2</b>	<b>5.2%</b>

## Primary Elevator Shipments by Commodity

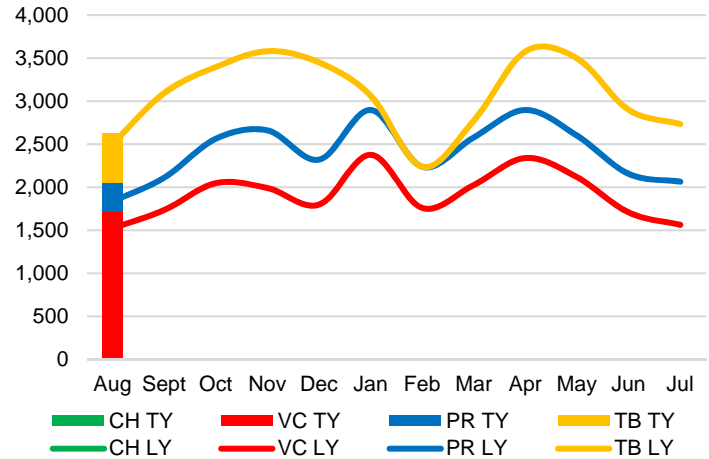


GMP Data Table 2A-1

Grain shipments from primary elevators remained steady in August achieving a level 3.5% higher than the in the first month

of the previous crop year. While producer deliveries were very light at the beginning of August, just over 0.4 MMT per week, they grew steadily as harvest advanced, achieving a level of nearly 1.5 MMT by the last week of the month.

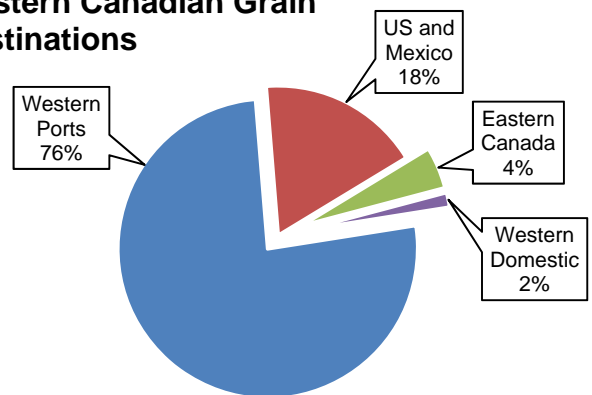
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Shipments out of the western ports grew in the first month of the crop year, registering a 5.2% increase on a year-over-year basis. Early-season indications are that the 2017 crop year will be of relatively good quality, with marketers optimistic that they will dodge some of the quality challenges faced last year.

## Western Canadian Grain Destinations

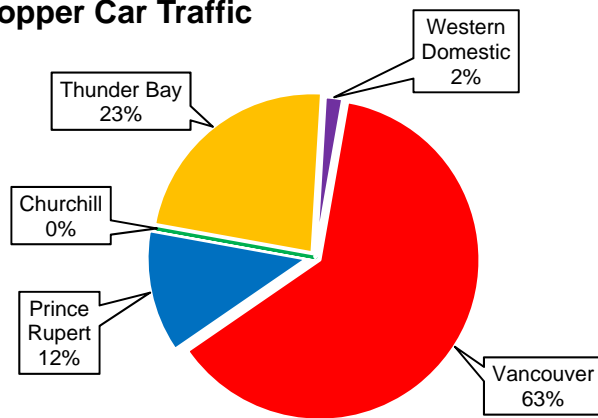


**Total YTD = 3.5 MMT**

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

Railway grain shipments from Western Canada totaled 3.5 MMT in August 2017, an increase of 0.7% over that observed a year earlier. The bulk of this, about 76%, was directed three ports situated in Western Canada in support of offshore sales. Total rail shipments to these ports in the first month of the 2017-18 crop year amounted to 2.7 MMT, down 3.8% from that handled in the opening month of the previous crop year. In comparison, Western Domestic shipments grew by a more substantive 31.3%. Shipments to Eastern Canada also rose by 31.3%, buoyed by a larger volume of wheat and other commodities.

## Western Canadian Destined Hopper Car Traffic

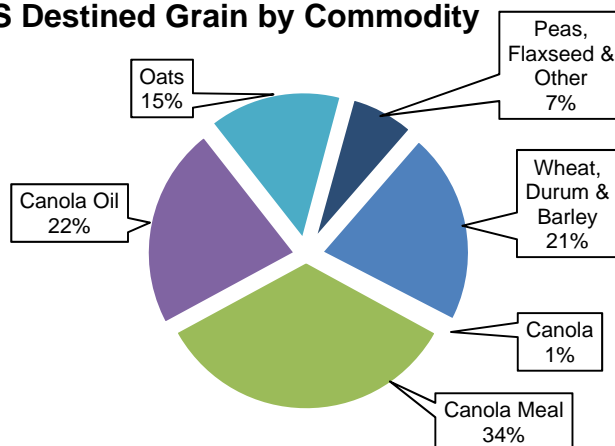


**Total YTD - 2.7 MMT**

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

Over 95% of the tonnage directed to destinations within Western Canada moves in covered hopper cars. This segment of the movement reached 2.7 MMT in August 2017, down 1.9% from that reported in the opening month of the previous crop year. Receiving 63% of these hopper cars was Vancouver, which remains the select destination of shippers given its access to Asia-Pacific markets, favourable economics and year-round operations. Even so, hopper-car shipments through Vancouver declined by 7.5%. This was enlarged by a 2.6% decrease in volume for Thunder Bay. The declines were partially offset by a gain at Prince Rupert, which posted a 34.2% increase in hopper-car shipments.

## US Destined Grain by Commodity

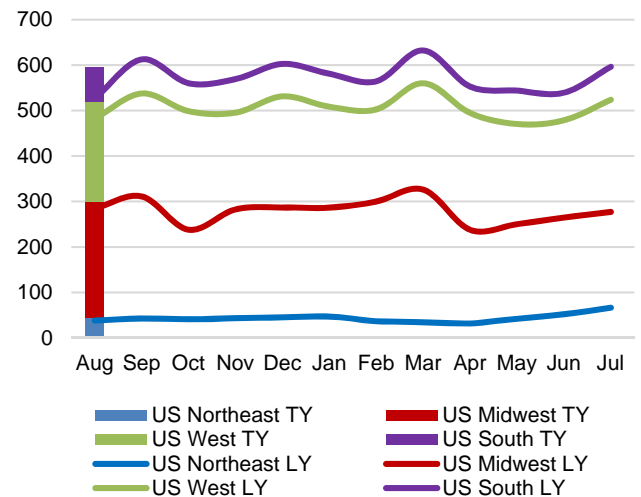


**Total YTD - 0.6 MMT**

GMP Data Table 2B-18

Total railway shipments into the US reached 594,600 tonnes in August 2017, a gain of 12.8% over that handled in the opening month of the previous crop year. Over 80% of these shipments are directed into markets in the 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 declined during August while country shipping remained steady to meet sales programs. Producer deliveries were reduced until harvest provided new crop supplies. The weekly average stock level fell to 2.9 MMT from 3.1 MMT in July. Country elevator stocks utilized 60% of the working capacity of the network. By province, stocks ranged from 56% and 58% of working capacity in Manitoba and Saskatchewan respectively to 71% in Alberta and 82% in British Columbia.

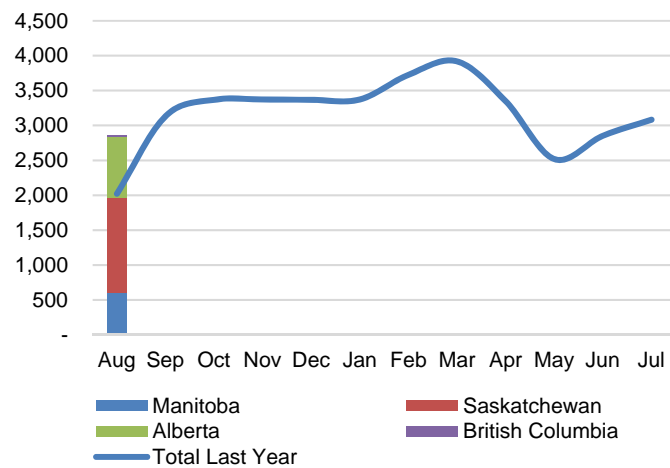
The average days-in-store in the primary-elevator system for the first month of the crop year increased substantially from last year, climbing 34.2%.

Table M-4	AUG 2017	2017-18 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	2,863.1	2,863.1	41.6%
Average Days in Store	26.7	26.7	34.2%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	16.6	16.6	21.9%
Cycle Time to Eastern Canada	25.9	25.9	1.0%
Cycle Time to US	31.4	31.4	33.1%
Loaded Transit to Western Ports	6.2	6.2	31.0%
Loaded Transit to Eastern Canada	12.6	12.6	10.0%
Loaded Transit to US	12.1	12.1	34.7%
Rail Fleet in Grain Service	17,062	17,062	7.2%

Table M-4	AUG 2017	2017-18 YTD	Var. from Last YTD
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,070.7	1,070.7	26.4%
Average Days in Store	13.5	13.5	20.5%
Port Unloads (hopper cars)	30,048	30,048	-3.7%
Terminal Out-of-Car Time	9.1%	9.1%	-41.7%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	9.5	9.5	39.7%

*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)

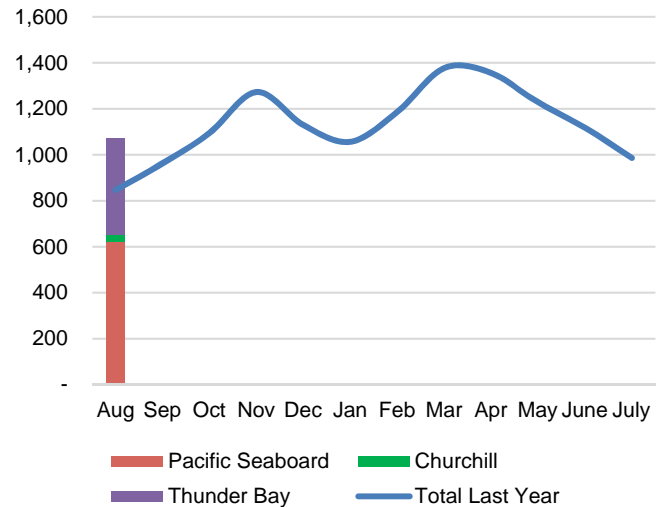


GMP Data Table 5A-2

Following a three-month rise to 3.1 MMT in July, average country elevator stocks reversed direction and fell to 2.9 MMT by August. Wheat, including durum and canola stock, comprise over 70% of the total stock. At 21% of the stock, barley, oats and peas comprise most of the balance. Weekly producer deliveries averaged just over 0.8 MMT throughout August.



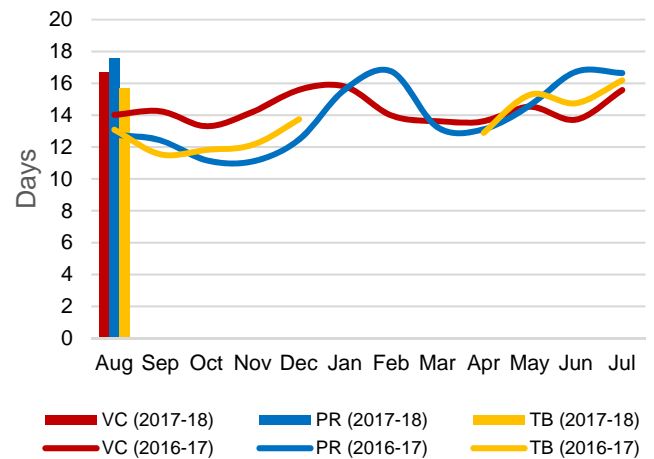
### Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.1 MMT in August, a modest buildup from the level seen a month earlier. Stock levels held relatively constant at the Pacific Seaboard while climbing at Thunder Bay. Wheat, including durum and canola stock, comprises over 86% of the total stock. Vessel arrivals continue to be sufficient to keep port operations fluid as the new crop year gets underway. Currently, western ports are utilizing just 62% of their overall working capacity.

### Railway Cycle Times to Western Ports (days)

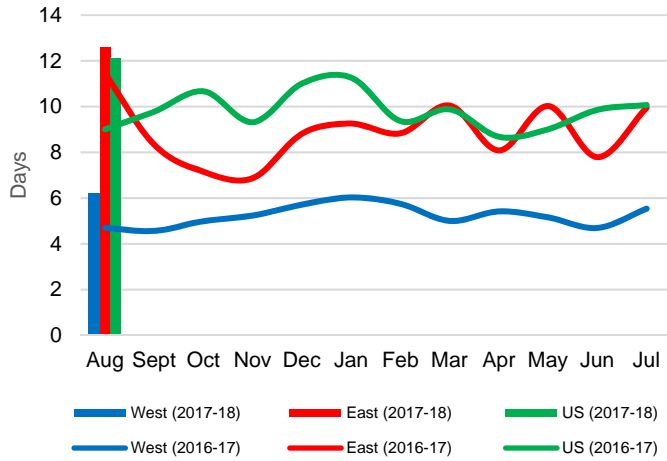


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 16.6 days in August 2017, an increase of 21.9% from the 13.6-day average posted in the opening month of the previous crop year. This result was shaped by increases in all corridors, with the Prince Rupert average rising by 37.2%; Thunder Bay by 19.9%; and Vancouver by 19.1%.

Car cycles to Eastern Canada posted a comparatively marginal increase of 1.0%, rising to an average of 25.9 days from 25.6 days a year earlier. The car cycle for movements into the United States proved more substantive, and increased by 33.1%, to an average of 31.4 days from the 23.6-day average posted in the opening month of the previous crop year.

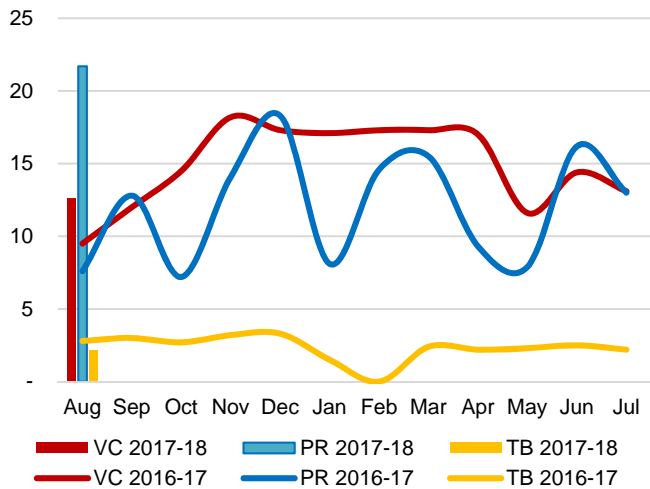
### Average Loaded Transit Times (days)



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 opening month of the 2017-18 crop year, up 31.0% from the 4.7-day average posted a year earlier. This result was primarily shaped by substantive increases in the Prince Rupert and Vancouver corridors, which rose by 78.7% and 28.7% respectively. A less influential 7.8% increase was also noted in the Thunder Bay-corridor average. The average loaded transit time for movements into Eastern Canada also increased, rising by 10.0%, to 12.6 days from 11.4 days the year previous. The same was true of US-destined traffic, which climbed by 34.7%, to an average of 12.1 days from twelve months before.

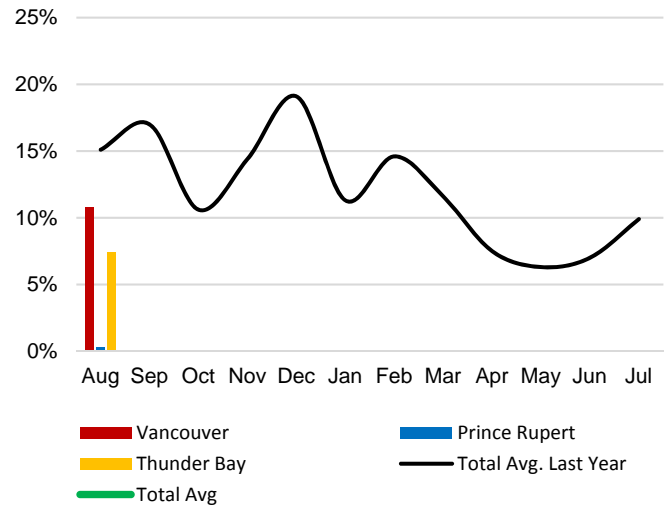
### Average Days in Port per Vessel



GMP Data Table 5D-1

In August, the average time vessels were in port waiting and loading grain was 39.7% greater than in the same month of the previous year. This escalation is primarily the result of the lineup of vessels waiting at Prince Rupert, which underwent a maintenance shutdown during the month. The average number of days in port at Vancouver and Thunder Bay, 12.6 and 2.2 respectively, are in line with previous performance.

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



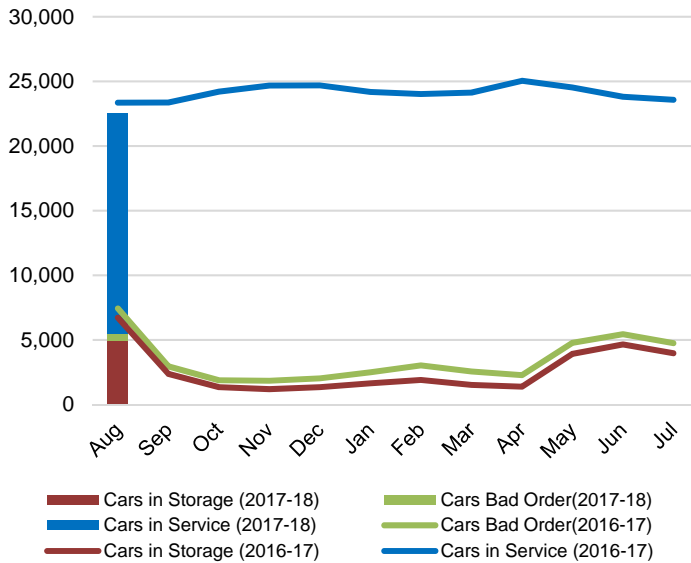
GMP Data Table 5C-5

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. The aggregate measure for all ports fell modestly to 9.1% in August from 9.9% by July. Terminal out-of-car time at Vancouver declined to 10.8% in August, and to 0.3% at Prince Rupert, while climbing to 7.4% at Thunder Bay.

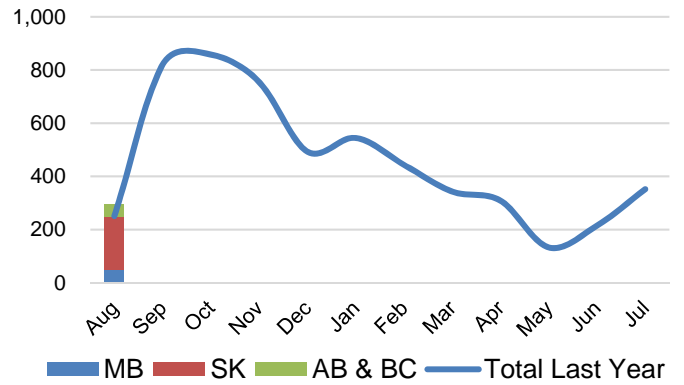
During times of heavy demand for grain hopper cars, nearly all of the grain hopper car fleet is placed in service. As traffic volumes slowed in the later months of the 2016-17 crop year, railways began the process of moving cars into storage. In July 2017, a weekly average of only 18,832 cars, representing 80% of the fleet was in active service. The cars in service dipped further during August, falling to 17,062, now encompassing 76% of the overall fleet. The balance of the fleet, comprising 24% of the rail cars, is in storage or repair status (bad order), a modest increase from 20% in July.

## Railway Grain Fleet Size and Utilization



GMP Data Table 3B-2

## Producer Cars Scheduled by Province



GMP Data Table 6B-2

While wheat, durum and oats comprise the largest proportion of producer cars, the number loaded with lentils and peas has been steadily increasing as of late. Shipments in the first month of the crop year continue to reflect this trend, with the traditional commodities comprising 63% of the total. The balance consists of barley, flaxseed, peas and lentils.



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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