



## GMP Dashboard

Table M-1	NOV 2024	DEC 2024	2024-25 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	37.5	40.1	39.3	-7.5%
Average Days In Store – Country	20.6	24.4	22.7	-7.3%
Loaded Transit Time	5.7	6.1	5.9	-0.8%
Average Days In Store – Terminal	11.2	9.6	10.7	-11.6%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	4,698.3	4,055.6	22,973.4	11.6%
Railway Shipments (all Western Canada traffic)	5,773.4	5,117.3	26,423.8	13.9%
Western Port Terminal Shipments	4,375.3	4,172.2	19,445.8	18.0%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	11,199	10,392	10,181	19.6%
Total Western Port Car Cycle (days)	12.5	13.8	13.8	-5.3%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	41,798	33,698	196,866	14.4%
Vessel Time in Port (days)	10.6	9.5	9.6	9.8%

*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 11.4% in December 2024, to 5.1 MMT from the 5.8 MMT reported in November. Despite a brief strike-related interruption to railway service, a comparatively stronger movement has lifted the year-to-date tonnage by 13.9%, to 26.4 MMT from 23.2 MMT a year earlier. Port shipments for December totaled 4.2 MMT, a 4.6% decrease from November. Year-to-date tonnage at 19.4 MMT is 18.0% more than in the previous crop year. Accompanying the month-over-month decrease in shipments, was a decrease in the average amount of time vessels spent in port, which fell to 9.5 days in December from 10.6 days registered in November.

## Highlights for December 2024

### Traffic and Movement (page 2)

- Primary-elevator shipments were 23.0 MMT in the first five months of the 2024-25 crop year, 11.6% more than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first five months of the 2024-25 crop year totaled slightly over 26.4 MMT, up 13.9% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 19.4 MMT in the first five months of the crop year, up 18.0% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks grew by 5.3% while the average days-in-store fell by 7.3%.
- Average weekly port-terminal stocks were increased by 4.7% from the same period last year, while average days-in-store fell by 11.6% on a year-over-year basis.
- The preliminary average car cycle for hopper-car movements to Western Canadian ports in December 2024 rose by 10.4%, to 13.8 days from 12.5 days in November. Comparatively better velocities also helped lower the year-to-date average to 13.8 days, 5.3% below the 14.6 days posted a year earlier. Conversely, the average for movements into Eastern Canada rose by a marginal 0.6% to 24.6 days, while the average for movements into the US fell by 10.6%, to 24.3 days.
- The year-to-date average for vessel time in port is 9.6 days, 9.8% more than that observed in the previous crop year.
- Port-terminal out-of-car time increased to 15.7% at Vancouver in December, from 5.6% in November. Prince Rupert saw out-of-car time jump to 24.3% for the month from 0.0% in November. Thunder Bay out-of-car time was 7.7% in December, up from 2.6% in November.

## 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 7.1 MMT of carry-forward stocks, some 9.8% less than in 2023, the overall grain supply is estimated at 78.6 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	7,076.3	7,846.4	-9.8%
<b>Total Grain Supply</b>	<b>78,574.6</b>	<b>77,010.1</b>	<b>2.0%</b>

## Traffic and Movement

December producer deliveries fell to an average of just over 0.9 MMT per week as the holiday season approached. Average weekly primary-elevator stocks climbed to 3.7 MMT in December, with good space in the elevator system.

Table M-3	Dec 2024	2024-25 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
Manitoba	635.6	4,242.3	-3.0%
Saskatchewan	2,112.5	11,658.1	17.1%
Alberta	1,279.3	6,953.3	13.2%
British Columbia	28.2	119.7	0.6%
<b>Total</b>	<b>4,055.6</b>	<b>22,973.4</b>	<b>11.6%</b>

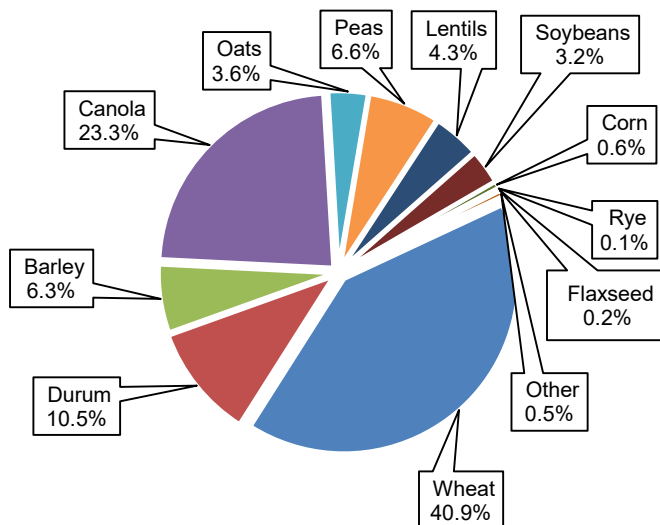
<b>Western Canada Railway Traffic (000's tonnes)</b>			
Shipments to Western Ports	4,073.4	21,551.0	15.3%
Shipments to Eastern Canada	176.0	836.0	15.4%
Shipments to US & Mexico	767.1	3,628.5	8.9%
Shipments Western Domestic	100.8	408.2	-7.5%
<b>Total</b>	<b>5,117.3</b>	<b>26,423.8</b>	<b>13.9%</b>

<b>Western Port Unloads (Number of Cars)</b>			
Vancouver	22,007	134,726	10.6%
Prince Rupert	4,093	19,737	95.3%
Churchill	0.0	0.0	n/a
Thunder Bay	7,598	42,403	5.5%
<b>Total</b>	<b>33,698</b>	<b>196,866</b>	<b>14.4%</b>

<b>Terminal Elevator Shipments (000's tonnes)</b>			
Vancouver	2,534.0	13,124.9	13.0%
Prince Rupert	499.3	1,948.9	104.0%
Churchill	0.0	0.0	n/a
Thunder Bay	1,138.9	4,372.0	11.9%
<b>Total</b>	<b>4,172.2</b>	<b>19,445.8</b>	<b>18.0%</b>



## Primary Elevator Shipments by Commodity

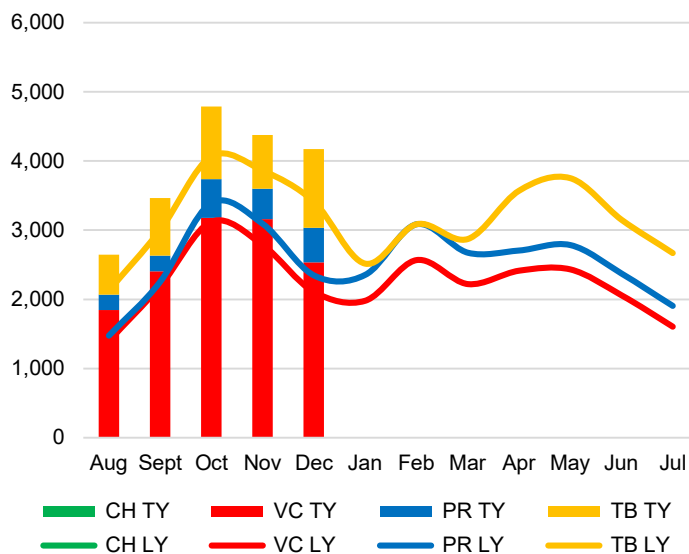


**Total YTD = 23.0 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators grew in the first five months of the crop year, registering 11.6% more than in the same period the previous year. Wheat, including durum, and canola constitute the largest proportion of the movement at 74.7%. Movement of peas and lentils contributed 10.9% of the total.

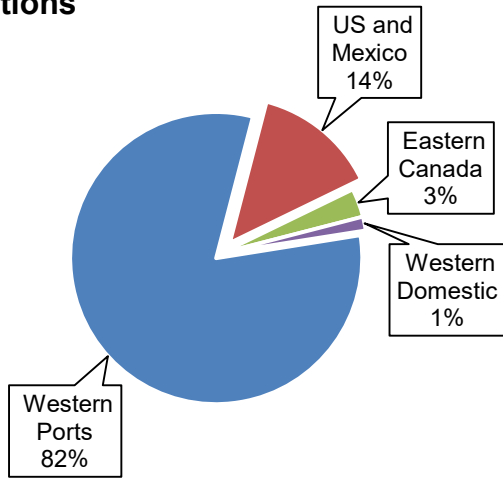
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Overall bulk grain shipments from western ports have increased 18.0% on a year-over-year basis. Crop year to date, Vancouver shipments are up 13.0% and Thunder Bay shipments are up 11.9%. Prince Rupert shipments recorded a year-over-year increase of 104.0% with a strong sales program in contrast to the previous year which saw a six-week shut down in the fall.

## Western Canadian Grain Destinations

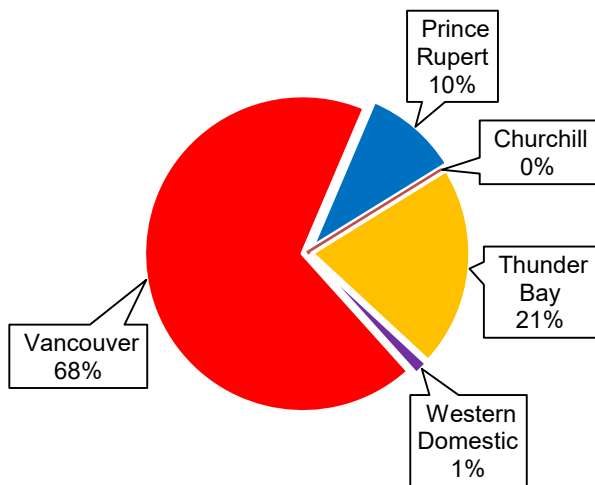


Total YTD = 26.4 MMT

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

Railway grain shipments from Western Canada totaled slightly over 26.4 MMT in the first five months of the 2024-25 crop year, a 13.9% increase over the 23.2 MMT handled in the same period a year earlier. The majority, about 21.6 MMT, was directed to Western Canadian ports, which saw a 15.3% gain in volume. This was supported by a 15.4% increase in shipments to Eastern Canada, and an 8.9% gain on movements into the US and Mexico. Conversely, Western Domestic volumes fell by 7.5%.

## Western Canadian Destined Hopper Car Traffic



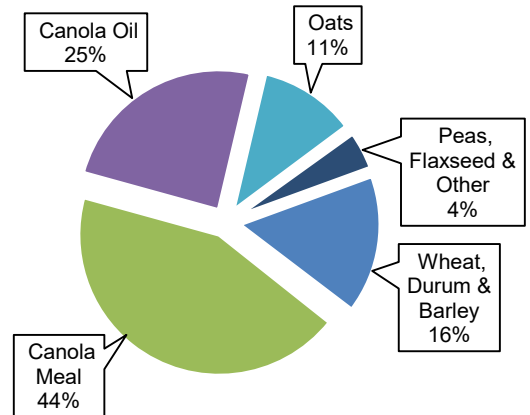
Total YTD = 21.2 MMT

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 five months of the 2024-25 crop year this amounted to over 21.2 MMT, up 13.4% from the previous year. Sixty-eight 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 8.5%. This upturn in west-coast traffic was supported by a significantly greater 72.6% increase in Prince Rupert volumes. Similarly, there was a 15.2% gain in shipments to Thunder Bay. These were only marginally offset by a 21.5% decline in Western Domestic traffic.

## US Destined Grain by Commodity

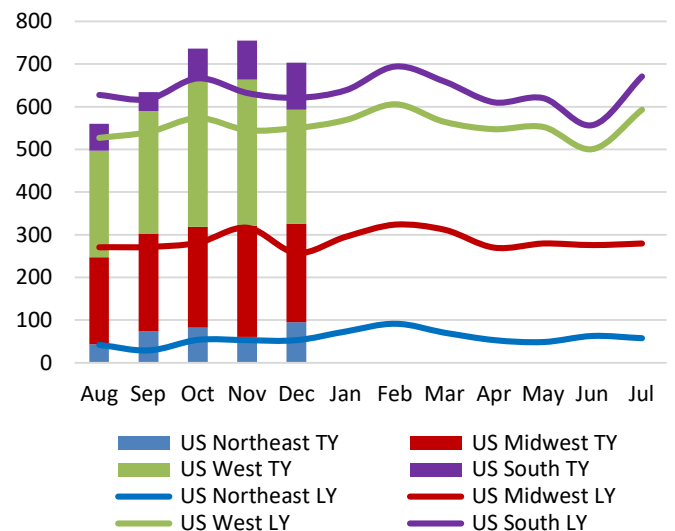


Total YTD = 3.4 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached slightly under 3.4 MMT in the first five months of the 2024-25 crop year, up 7.0% from that moved in the same period a year earlier. Just under 80% 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

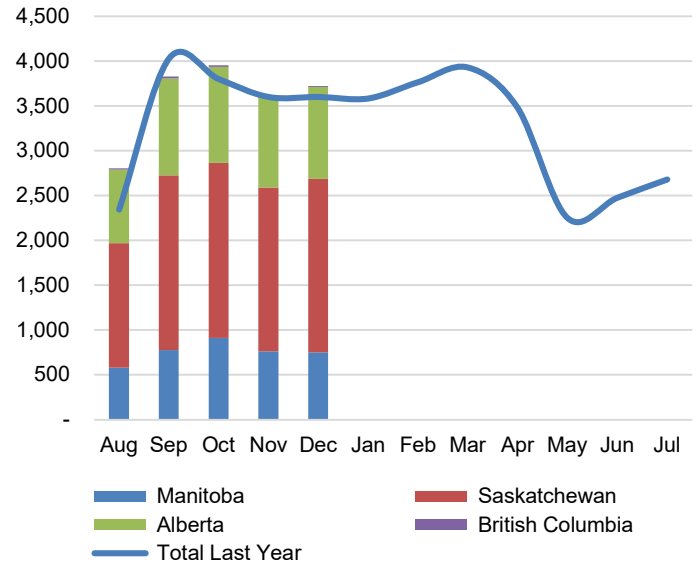
Primary elevator stocks grew in December, averaging 3.7 MMT with typical winter operating conditions. Overall space in the country system was good. Country stocks utilized just 70% of the working capacity of the network. By province, stocks ranged from 54% in British Columbia, and 63% in Alberta, to 71% and 74% in Manitoba and Saskatchewan respectively.

The average days-in-store in the primary-elevator system for the first five months of the crop year decreased from the same period last year, falling 7.3% to 22.7 days.

Table M-4	Dec 2024	2024-25 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	3,721.6	3,602.2	5.3%
Average Days in Store	24.4	22.7	-7.3%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	13.8	13.8	-5.3%
Cycle Time to Eastern Canada	24.7	24.6	0.6%
Cycle Time to US	24.2	24.3	-10.6%
Loaded Transit to Western Ports	6.1	5.9	-0.8%
Loaded Transit to Eastern Canada	11.5	10.9	-9.2%
Loaded Transit to US	11.1	9.5	-11.1%
Rail Fleet in Grain Service	21,639	20,141	11.8%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,235.8	1,322.1	4.7%
Average Days in Store	9.6	10.7	-11.6%
Port Unloads (hopper cars)	33,698	196,866	14.4%
Terminal Out-of-Car Time	14.8%	11.6%	-12.8%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	9.5	9.6	9.8%



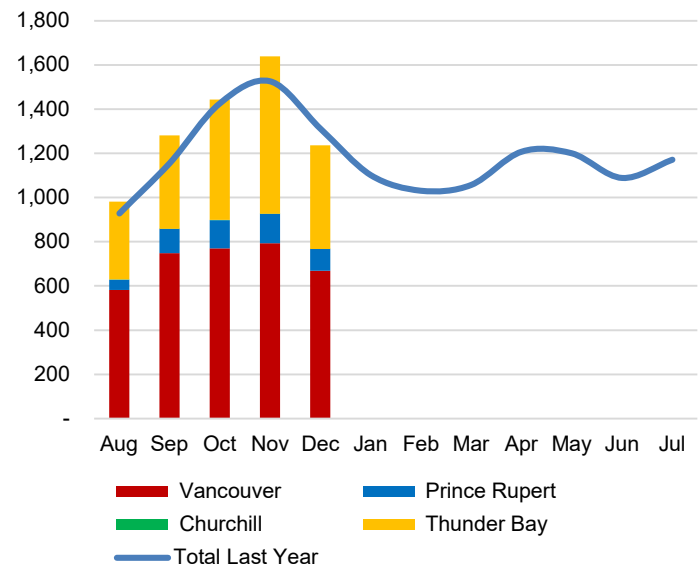
## Average Weekly Primary Elevator Stocks (000's tonnes)



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 3.7 MMT by December. Wheat, including durum, and canola, comprise 66% of the total stock. At 17% of the stock, barley, oats and peas made up much of the balance.

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

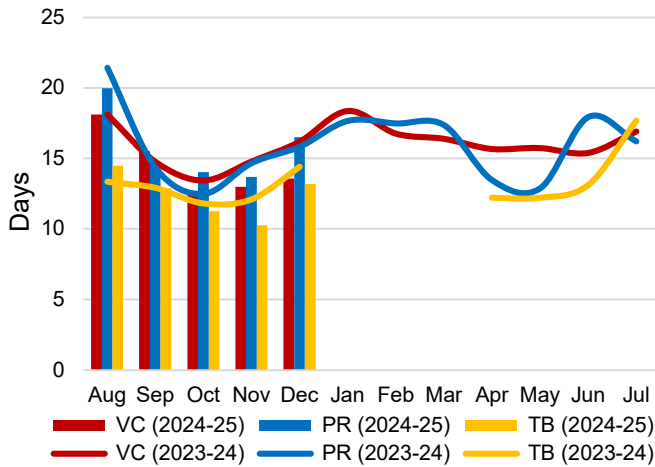


GMP Data Table 5C-2

Overall terminal elevator stocks averaged over 1.2 MMT in December, down 0.4 MMT from those in-store during November. Stocks fell at all three western ports, with the largest decline at Thunder Bay prior to the winter closure. Wheat, including durum, and canola, comprise 78% of the total stock. In December, western ports utilized 64% of their overall working capacity.



## Railway Cycle Times to Western Ports (days)

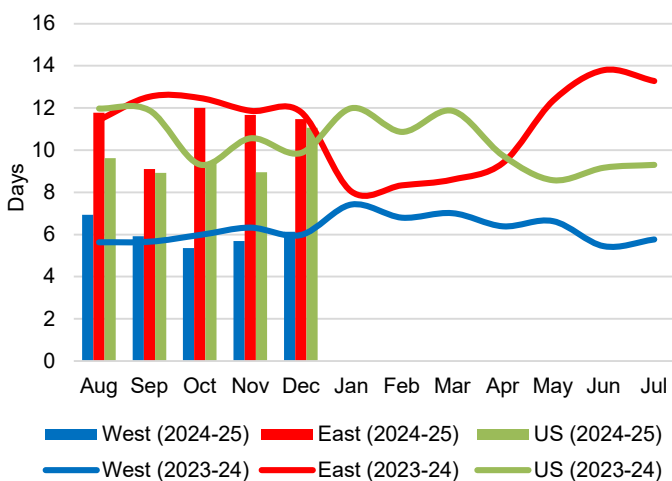


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 13.8 days in the first five months of the 2024-25 crop year, down 5.3% from the 14.6-day average reported a year earlier. This result was largely shaped by a 6.1% decrease in the Vancouver corridor average along with a 7.0% reduction in the average for Thunder Bay. Running counter to these declines was the Prince Rupert average, which increased by 4.7%.

This was accompanied by a marginal 0.6% increase in the car cycle for movements into Eastern Canada, which rose to an average of 24.6 days from 24.5 days a year earlier. A 10.6% decrease was noted in the cycle for US movements, which fell to an average of 24.3 days from 27.2 days the previous year.

## Average Loaded Transit Times (days)

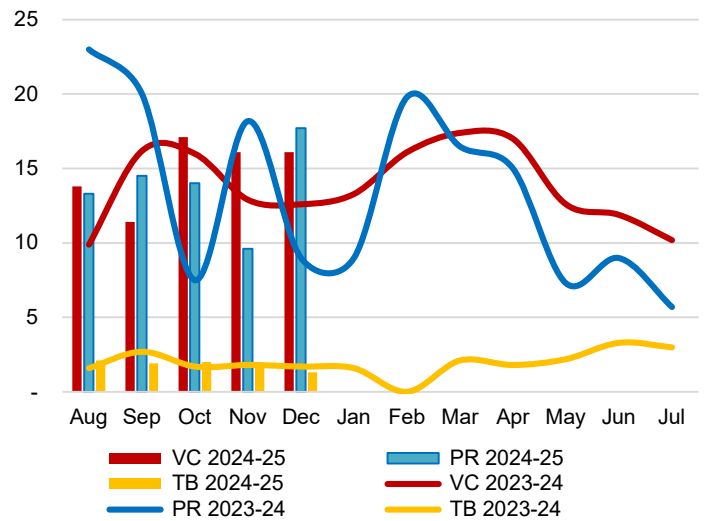


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 5.9 days in the first five months of the 2024-25 crop year, down 0.8% from a similar 5.9-day average posted the previous year. This result was largely driven by a 1.0% reduction in the Vancouver-corridor average and supported by a 2.5% decline in the Thunder Bay corridor average. Conversely, the

Prince Rupert average rose by 8.5%. The average into Eastern Canada fell by a more substantive 9.2%, to 10.9 days from 12.0 days a year earlier. Similarly, the average on US-bound traffic fell by a marginally greater 11.1%, to 9.5 days from 10.7 days.

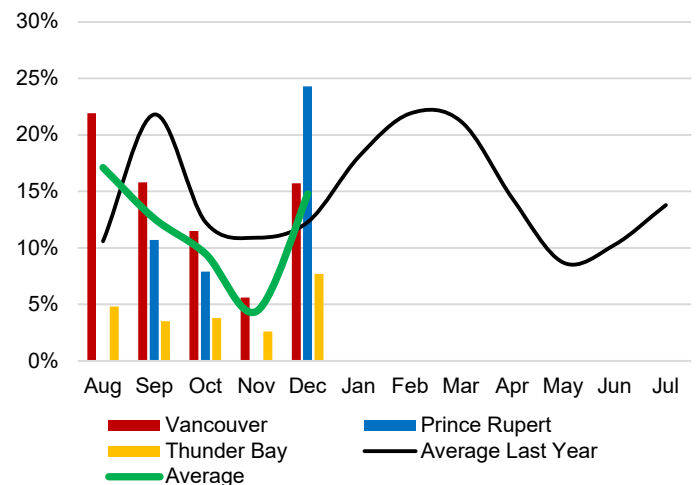
## Average Days in Port per Vessel



GMP Data Table 5D-1

In December, the overall-average time vessels were in port waiting and loading grain was 9.5 days, 43.0% more than was the case in December 2023. The month-over-month average held steady at 16.1 days for Vancouver, while increasing to 17.7 for Prince Rupert. At Thunder Bay, the average time vessels were in port declined to 1.3 days.

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

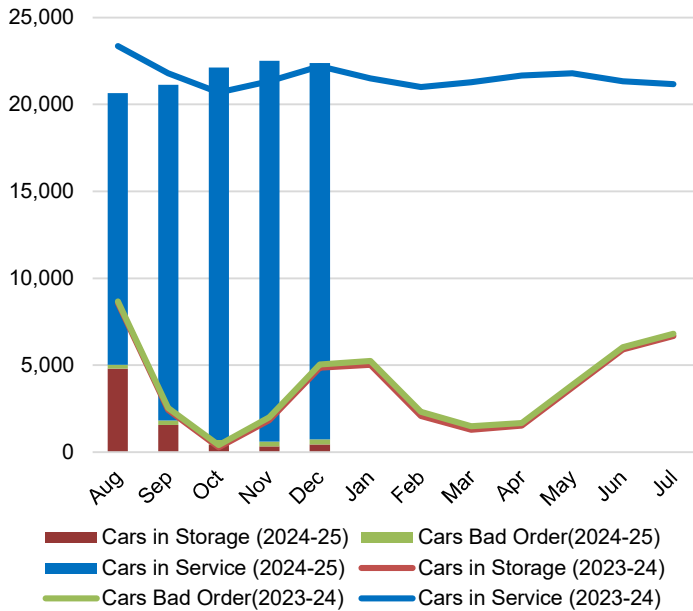


GMP Data Table 5C-5

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 14.8% in December, from 4.4% in November. Terminal out-of-car time increased to 15.7% at Vancouver while jumping to 24.3% at Prince Rupert. Thunder Bay terminals registered 7.7% out-of-car time in December, a nearly-three-fold% rise from that seen in November.

### Railway Grain Fleet Size and Utilization



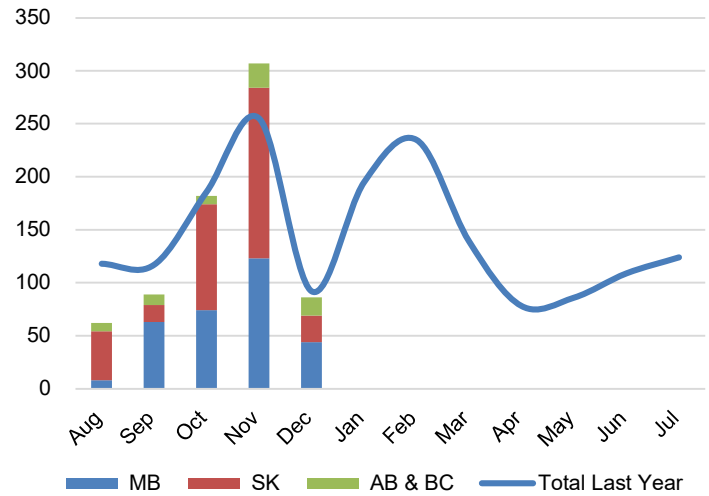
GMP Data Table 3B-2

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 substantial uptick in the serviceable-car count is seen in the November 2024 weekly average, which rose to 21,895 before backing off slightly to 21,639 in December. In December,

97% 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 December 2024 were 6.5% less than those in December a year earlier. Year to date, oats comprise 51% of the movement, considerably greater than the 41% shipped the previous crop year. Wheat and durum comprise just 29% of the year-to-date total. The majority of producer cars, over 53%, 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

