

## GMP Dashboard

Table M-1	MAY 2025	JUN 2025	2024-25 YTD	Var. from Last YTD
<b>Western Canadian GHTS Performance (Days)</b>				
Total Time in System	34.0	37.3	40.6	-2.2%
Average Days In Store – Country	17.5	20.7	23.7	-2.5%
Loaded Transit Time	5.6	4.7	6.0	-5.3%
Average Days In Store – Terminal	10.9	11.9	10.9	0.0%
<b>Total Traffic ('000 tonnes)</b>				
Primary Elevator Shipments	3,847.3	3,753.5	48,806.5	10.8%
Railway Shipments (all Western Canada traffic)	4,944.8	4,491.2	55,393.4	11.0%
Western Port Terminal Shipments	3,999.9	3,502.8	40,622.2	14.7%
<b>Railway Performance</b>				
Avg. Loads on Wheels (Cars)	8,388	6,964	9,680	8.6%
Total Western Port Car Cycle (days)	13.0	13.5	14.2	-6.8%
<b>Port Performance</b>				
Western Port Unloads (Number of Cars)	37,116	31,867	417,054	13.8%
Vessel Time in Port (days)	8.8	7.4	10.9	11.1%

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 9.2% in June 2025, to almost 4.5 MMT from the 4.9 MMT reported in May. Despite a brief strike-related interruption to railway service earlier in the crop year, a comparatively stronger movement has lifted the year-to-date tonnage by 11.0%, to 55.4 MMT from 49.9 MMT a year earlier. Port shipments for June totaled 3.5 MMT, a 12.4% decrease from May. Year-to-date tonnage, at 40.6 MMT, is 14.7% more than in the previous crop year. The average amount of time vessels spent in ports fell to 7.4 days in June from the 8.8 days registered in April.

## Highlights for June 2025

### Traffic and Movement (page 2)

- Primary-elevator shipments were 48.8 MMT in the first eleven months of the 2024-25 crop year, 10.8% more than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first eleven months of the 2024-25 crop year totaled slightly under 55.4 MMT, up 11.0% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 40.6 MMT in the first eleven months of the crop year, up 14.7% from the same period last year.

### System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks grew by 10.5% while the average days-in-store fell by 2.5%.
- Year-to-date average weekly port-terminal stocks were up 9.3% over last year, while average days-in-store were even with last year.
- The preliminary average car cycle for hopper-car movements to Western Canadian ports in June 2025 rose by 3.8%, to 13.5 days from 13.0 days in May. Comparatively better velocities also helped lower the year-to-date average to 14.2 days, 6.8% below the 15.2 days posted a year earlier. Conversely, the average for movements into Eastern Canada rose by 14.2% to 24.5 days, while the average for movements into the US fell by 1.5%, to 26.3 days.
- The year-to-date average for vessel time in port is 10.9 days, 11.1% more than that observed in the previous crop year.
- The month of June 2025 saw port-terminal out-of-car time increase at Vancouver and Thunder Bay over May. From 13.9% to 18.9% at Vancouver and from 2.7% to 5.4% at Thunder Bay. The overall average correspondingly rose to 15.6% in June from May's 10.8%. Prince Rupert did not report out-of-car time during the month.

## Production and Supply

Statistics Canada's November producer-survey estimate for 2024 field-crop production in Western Canada stands at 72.8 MMT, a 4.9% increase from 2023's 69.4 MMT harvest. While this estimate is, overall, little changed from the August model-based estimate, a June 2025 revision by Statistics Canada increased the canola projection by 1.3 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 7.5 MMT of carry-forward stocks, also bolstered by a June 2025 revision to add 0.4 MMT to canola stocks, the overall grain supply is estimated at 80.4 MMT. This is

4.0% greater than the 2023-24 crop year's 77.3-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>			
<b>Western Canada Total Production - Preliminary</b>	72,838.6	69,435.6	4.9%
<b>Western Canada On-Farm &amp; Primary-Elevator Carry Forward Stock</b>	7,523.3	7,855.4	-4.2%
<b>Total Grain Supply</b>	<b>80,361.9</b>	<b>77,291.0</b>	<b>4.0%</b>

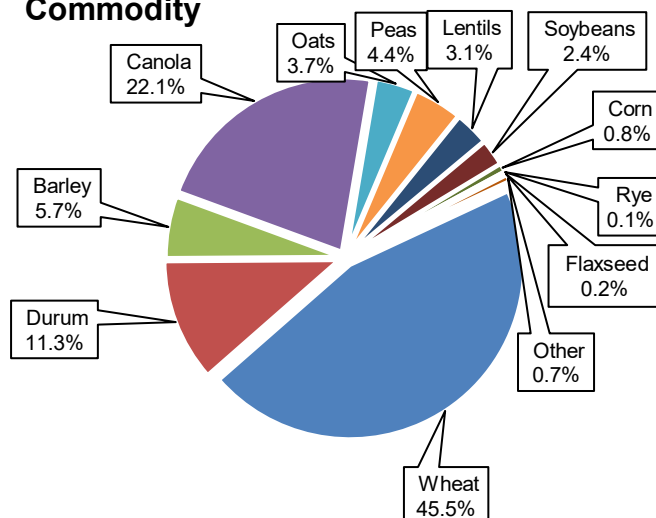
## Traffic and Movement

June producer deliveries rose to a weekly average of just over 1.0 MMT with seeding completed. Average weekly primary-elevator stocks climbed to 3.0 MMT in June, from May's 2.6 MMT.

Table M-3	JUN 2025	2024-25 YTD	Var. from Last YTD
<b>Primary Elevator Shipments (000's tonnes)</b>			
<b>Manitoba</b>	801.9	8,486.6	1.2%
<b>Saskatchewan</b>	1,843.4	24,917.8	16.0%
<b>Alberta</b>	1,091.9	15,162.7	9.0%
<b>British Columbia</b>	16.3	239.4	-7.4%
<b>Total</b>	<b>3,753.5</b>	<b>48,806.5</b>	<b>10.8%</b>
<b>Western Canada Railway Traffic (000's tonnes)</b>			
<b>Shipments to Western Ports</b>	3,616.7	44,279.9	12.3%
<b>Shipments to Eastern Canada</b>	130.2	2,406.2	14.0%
<b>Shipments to US &amp; Mexico</b>	599.7	7,710.2	4.0%
<b>Shipments Western Domestic</b>	144.6	997.1	3.4%
<b>Total</b>	<b>4,491.2</b>	<b>55,393.4</b>	<b>11.0%</b>
<b>Western Port Unloads (Number of Cars)</b>			
<b>Vancouver</b>	20,572	291,533	11.4%
<b>Prince Rupert</b>	2,808	48,220	45.6%
<b>Churchill</b>	0	0	n/a
<b>Thunder Bay</b>	8,487	77,301	7.9%
<b>Total</b>	<b>31,867</b>	<b>417,054</b>	<b>13.8%</b>
<b>Terminal Elevator Shipments (000's tonnes)</b>			
<b>Vancouver</b>	2,281.2	28,219.6	11.6%
<b>Prince Rupert</b>	307.8	4,696.0	44.2%
<b>Churchill</b>	0.0	0.0	n/a
<b>Thunder Bay</b>	913.8	7,706.6	12.0%
<b>Total</b>	<b>3,502.8</b>	<b>40,622.2</b>	<b>14.7%</b>



## Primary Elevator Shipments by Commodity

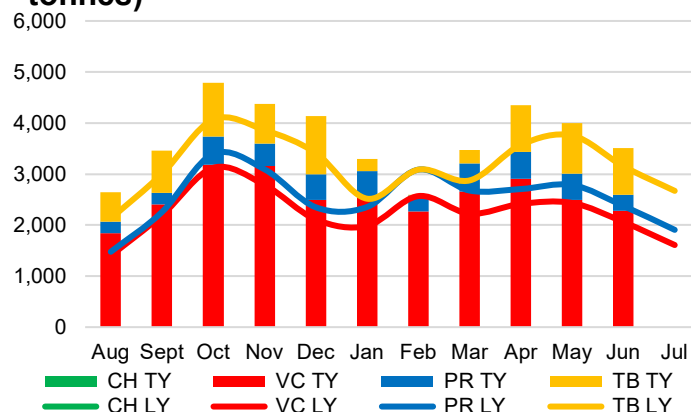


**Total YTD = 48.8 MMT**

GMP Data Table 2A-1

Grain shipments from primary elevators grew in the first eleven months of the crop year, registering 10.8% more than in the same period of the previous year. Wheat, including durum, and canola constitute the largest proportion of the movement at 78.9%. Shipments of peas and lentils contributed 7.6% of the total.

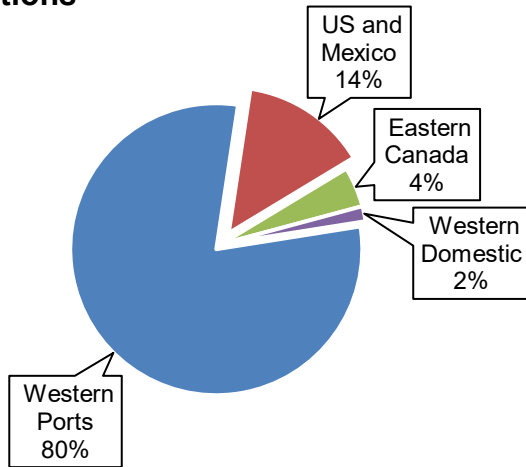
## Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Overall bulk grain shipments from western ports have increased 14.7% on a year-over-year basis. Crop year to date, Vancouver shipments are up 11.6%, Prince Rupert shipments are up 44.2%, and Thunder Bay shipments are up 12.0%.

## Western Canadian Grain Destinations

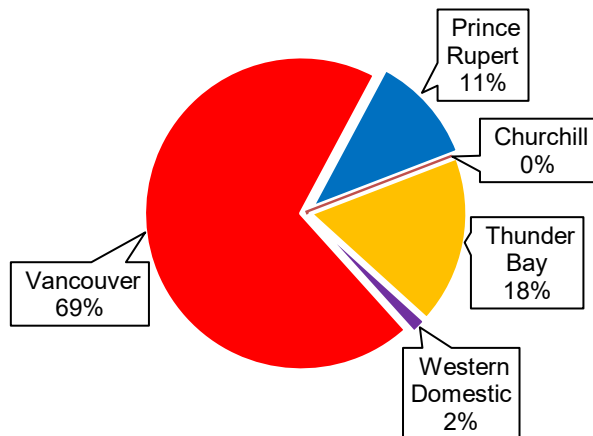


Total YTD = 55.4 MMT

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

Railway grain shipments from Western Canada totaled slightly under 55.4 MMT in the first eleven months of the 2024-25 crop year, an 11.0% increase over the 49.9 MMT handled in the same period a year earlier. The majority, about 44.3 MMT, was directed to Western Canadian ports, which saw a 12.3% gain in volume. This was supported by a 14.0% increase in shipments to Eastern Canada, and a 4.0% gain on movements into the US and Mexico. A sharp spike in Western Domestic traffic for June reversed earlier declines, with total volume rising by 3.4%.

## Western Canadian Destined Hopper Car Traffic



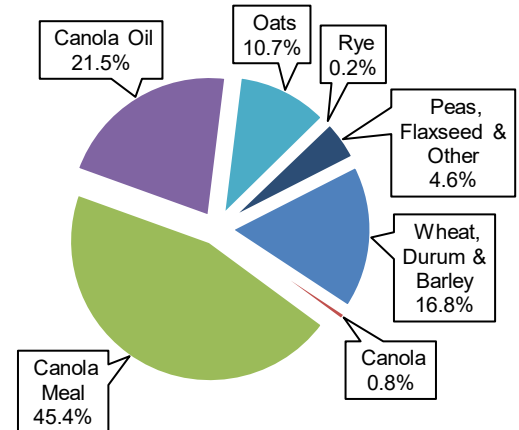
Total YTD = 43.6 MMT

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 eleven months of the 2024-25 crop year this amounted to about 43.6 MMT, up

10.8% from the previous year. Sixty-nine 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 8.0%. This upturn in west-coast traffic was supported by a significantly greater 35.4% increase in Prince Rupert volumes. Similarly, there was an 11.0% gain in shipments to Thunder Bay. These were only marginally offset by a 5.0% decline in Western Domestic traffic.

## US Destined Grain by Commodity

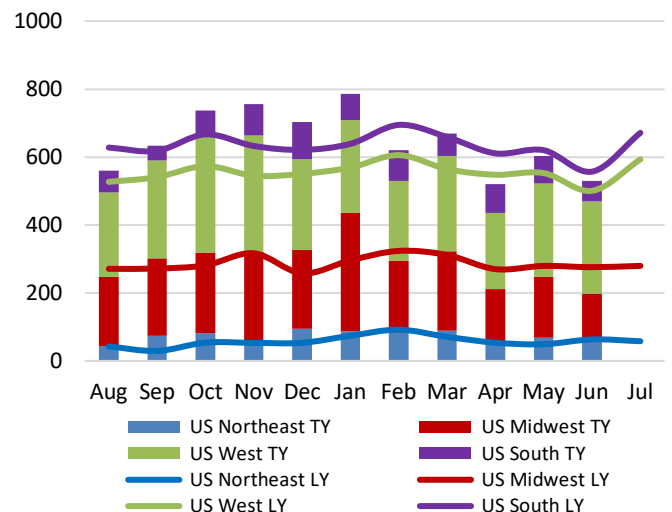


Total YTD = 7.1 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached slightly above 7.1 MMT in the first eleven months of the 2024-25 crop year, up 2.5% from that moved in the same period a year earlier. Over 77% of these shipments were directed into the US Midwest and West, with canola products dominating.

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



GMP Data Table 2B-18



## System Efficiency and Performance

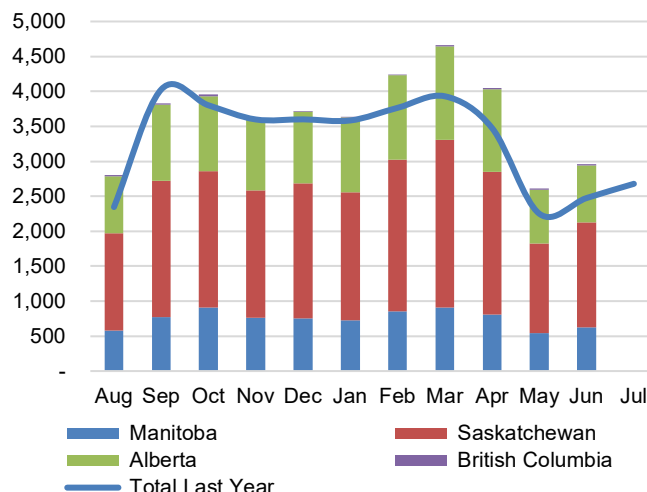
Primary elevator stocks increased in June averaging 3.0 MMT as seeding completed across the prairies. Overall space in the country system was good. Country stocks utilized only 56% of the working capacity of the network. By province, stocks ranged from 50% in Alberta, 57% in Saskatchewan, 59% in Manitoba, to 82% in British Columbia.

The average days-in-store in the primary-elevator system for the first eleven months of the crop year decreased from the same period last year, falling 2.5% to 23.7 days.

Table M-4	JUN 2025	2024-25 YTD	Var. from Last YTD
<b>Primary Elevator</b>			
Average Weekly Stocks (000's tonnes)	2,958.8	3,658.6	10.5%
Average Days in Store	20.7	23.7	-2.5%
<b>Railway Operations (days)</b>			
Cycle Time to Western Ports	13.5	14.2	-6.8%
Cycle Time to Eastern Canada	24.5	24.5	14.2%
Cycle Time to US	27.3	26.3	-1.5%
Loaded Transit to Western Ports	4.7	6.0	-5.3%
Loaded Transit to Eastern Canada	9.8	10.7	7.4%
Loaded Transit to US	12.0	10.8	2.4%
Rail Fleet in Grain Service	20,448	21,659	-0.1%
<b>Western Canada Terminal Elevator</b>			
Average Weekly Stocks (000's tonnes)	1,319.4	1,291.9	9.3%
Average Days in Store	11.9	10.9	0.0%
Port Unloads (hopper cars)	31,867	417,054	13.8%
Terminal Out-of-Car Time	15.6%	14.2%	-7.0%
<b>Western Canada Port Operations</b>			
Average Vessel Time in Port (days)	7.4	10.9	11.1%



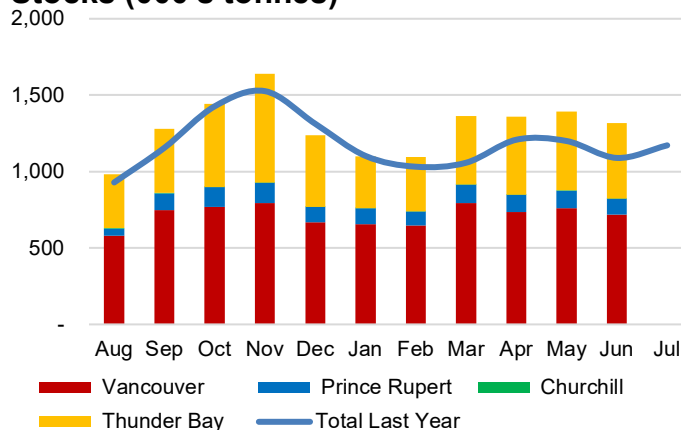
## Average Weekly Primary Elevator Stocks (000's tonnes)



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. March's 4.7 MMT stock level will likely be the peak for the 2024-25 crop year as the balance typically remains lower throughout Q4. June saw a 13% increase over May to end with average weekly stocks of 3.0 MMT. Wheat, including durum, and canola, comprise 69% 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)

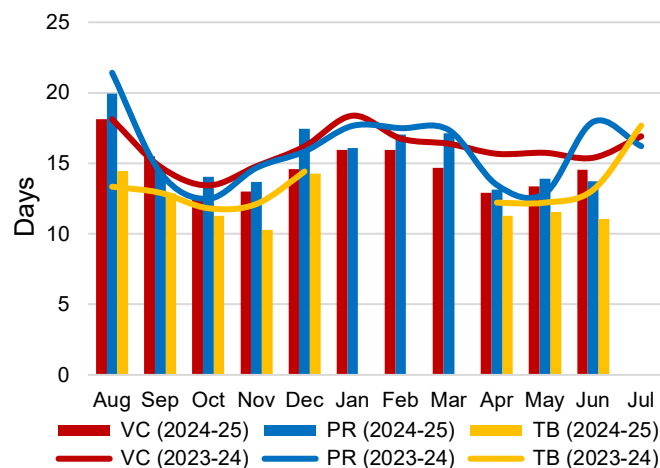


GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.3 MMT in June, down 5.2% from May. Wheat, including durum, and canola, comprise 80% of the total stock. In June, western ports utilized 68% of their overall working capacity.



## Railway Cycle Times to Western Ports (days)

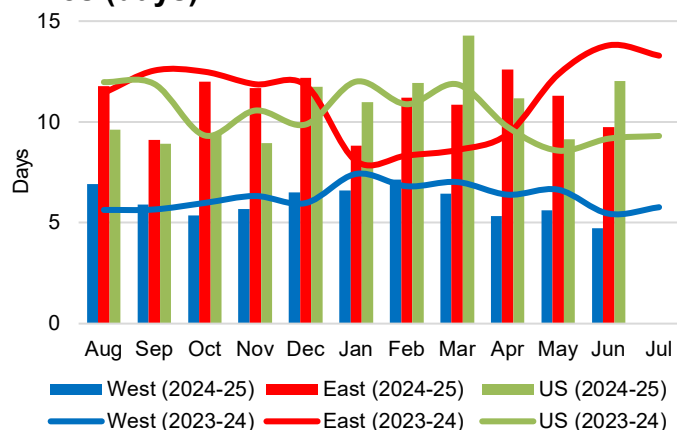


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 14.2 days in the first eleven months of the 2024-25 crop year, down 6.8% from the 15.2-day average reported a year earlier. This result was largely shaped by an 8.5% decrease in the Vancouver corridor average followed by a 3.1% reduction in the average for Thunder Bay. These were supported by a 2.3% decrease in the Prince Rupert average.

This was accompanied by a 14.2% increase in the car cycle for movements into Eastern Canada, which rose to an average of 24.5 days from 21.5 days a year earlier. A 1.5% decrease was noted in the cycle for US movements, which fell to an average of 26.3 days from 26.7 days the previous year.

## Average Loaded Transit Times (days)

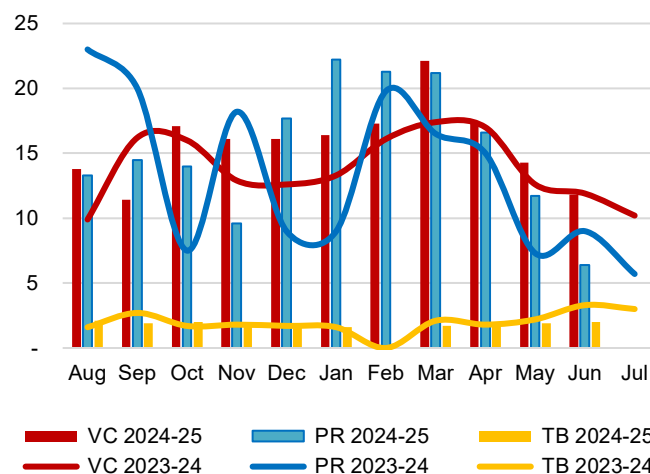


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 6.0 days in the first eleven months of the 2024-25 crop year, down 5.3% from the 6.4-day average posted the year before. This result was largely driven by a 7.0% reduction in the Vancouver-corridor average and supported by a 3.7% decline in the Thunder Bay corridor average. Conversely, the Prince Rupert average rose by 6.8%. Similarly, the average into Eastern Canada rose by 7.4%, to 10.7 days from 10.0 days a year earlier.

The average on US-bound traffic also increased, albeit by a more marginal 2.4%, to 10.8 days from 10.5 days.

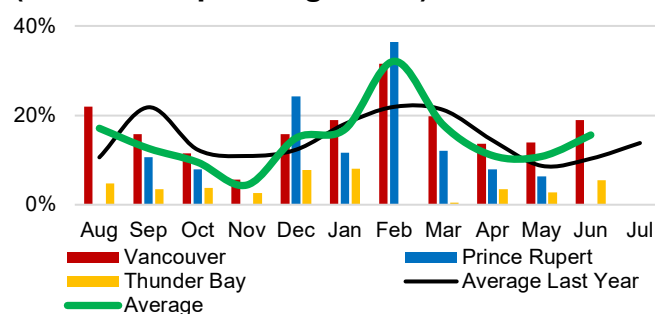
## Average Days in Port per Vessel



GMP Data Table 5D-1

In June 2025, the overall-average time vessels were in port waiting and loading grain was 7.4 days, 6.9% less than was the case in June 2024. The month-over-month average fell at the west coast ports. Vancouver's average fell 2.5 days to 11.8 days and Prince Rupert saw a 5.3-day improvement to 6.4 days. Thunder Bay, however, had a slight 0.1 day increase over May 2025 to 2.0 days in port. The typical vessel charter party agreement for the West Coast will allow 10 to 12 days in port before demurrage starts being charged.

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



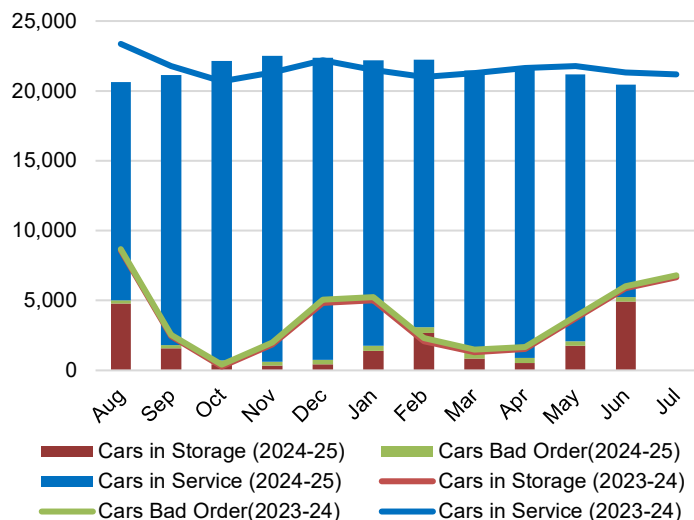
GMP Data Table 5C-5

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 increased in June, ending at 15.6% versus May's 10.8%. Terminal out-of-car time increased to 18.9% at Vancouver and to 5.4% at Thunder Bay.



## Railway Grain Fleet Size and Utilization



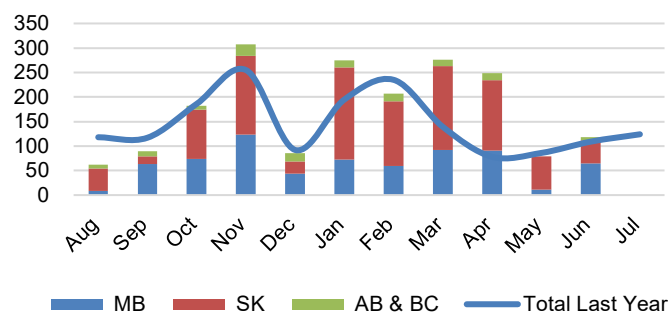
GMP Data Table 3B-2

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. At the outset of the 2024-25 crop year only 24% of the fleet remained in storage. The serviceable-car count rose to a peak in November, with 97% of the fleet in service before gradually decreasing monthly to 90% in May 2025. June 2025 saw a larger decrease in the serviceable-car count than previous months, falling to 15,196 cars from May's 19,108 cars. In June, 74% 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 June 2025 were 8.3% more than those in June a year earlier. Year to date, oats comprise 52% of the movement, measurably greater than the 40% shipped over the same period last year. Wheat and durum comprise just 29% of the year-to-date total. Most producer cars, over 55%, 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