Grain Monitoring Program Report for: August 2025

Release Date: September 17, 2025

GMP Dashboard

Table M-1	JUL 2025	AUG 2025	2025-26 YTD	Var. from Last YTD
Western Canadian GHTS Performance (Days)				
Total Time in System	42.2	44.1	44.1	-3.0%
Average Days In Store – Country	23.7	24.0	24.0	-8.4%
Loaded Transit Time	4.9	4.8	4.8	-31.5%
Average Days In Store – Terminal	13.8	15.3	15.3	24.4%
Total Traffic ('000 tonnes)				
Primary Elevator Shipments	3,275.7	2,567.5	2,567.5	-22.5%
Railway Shipments (all Western Canada traffic)	3,627.2	3,246.7	3,246.7	-13.0%
Western Port Terminal Shipments	2,904.1	1,999.9	1,999.9	-24.5%
Railway Performance				
Avg. Loads on Wheels (Cars)	5,547	4,331	4,331	-39.8%
Total Western Port Car Cycle (days)	15.0	14.4	14.4	-18.2%
Port Performance				
Western Port Unloads (Number of Cars)	27,186	19,513	19,513	-24.5%
Vessel Time in Port (days)	4.7	4.3	4.3	-52.2%

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 10.5% in August 2025, to 3.2 MMT from the 3.6 MMT reported in July. It also marked a weaker start to the 2025-26 crop-year, with tonnage down by 13.0% from the 3.7 MMT handled a year earlier. Port shipments for August totaled 2.0 MMT, a 31.1% decrease from July. Year-to-date tonnage at 2.0 MMT is 24.5% less than in the previous crop year. The month-over-month decrease in shipments was accompanied by a decrease in the average amount of time vessels spent in port, which dropped to 4.3 days in August from 4.7 in July.

Highlights for August 2025

Traffic and Movement (page 2)

- Primary-elevator shipments were 3.2 MMT in the first month of the 2025-26 crop year, 22.5% less than last year.
- Total Western Canadian rail shipments to all destinations (from all primary/process elevators and producer-car sites) in the first month of the 2025-26 crop year totaled over 3.2 MMT, down 13.0% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 2.0 MMT in the first month of the crop year, down 24.5% from the same period last year.

System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks shrank by 23.1% while the average days-in-store decreased by 8.4%.
- Average weekly port-terminal stocks were 2.6% lower than the same period last year, while average days-in-store grew by 24.4% on a year-over-year basis.
- The preliminary average car cycle for hopper-car movements to Western Canadian ports in August 2025 fell to 14.4 days from the 15.0 days recorded in July. Comparatively faster velocities in the opening month of the 2025-26 crop year also helped lower the August average by 18.2% from the 17.7 days posted a year earlier. The average for movements into Eastern Canada fell by a lesser 5.7% to 26.7 days, while the average for movements into the US fell by 12.3%, to 25.7 days.
- The year-to-date average for vessel time in port is 4.3 days, 52.2% less than that August of the previous crop year.
- Port-terminal out-of-car time began the 2025-26 crop year at 8.4% at Vancouver, 0.0% at Prince Rupert, and 7.6% at Thunder Bay. The combined value of 7.7% out-of-car time was 55.0% lower than August of the 2024-25 crop year.

Production and Supply

Statistics Canada's July model-based estimate for 2025 field-crop production in Western Canada stands at 74.6 MMT, a 1.0% increase from 2024's 73.8 MMT harvest. This initial estimate will be updated twice in the coming months. The 2025 growing season saw regional differences with many areas affected by persistent hot and dry conditions while others received adequate rainfall. Such conditions led to highly variable crop yield and quality estimates across the prairies. Harvest is currently well underway.

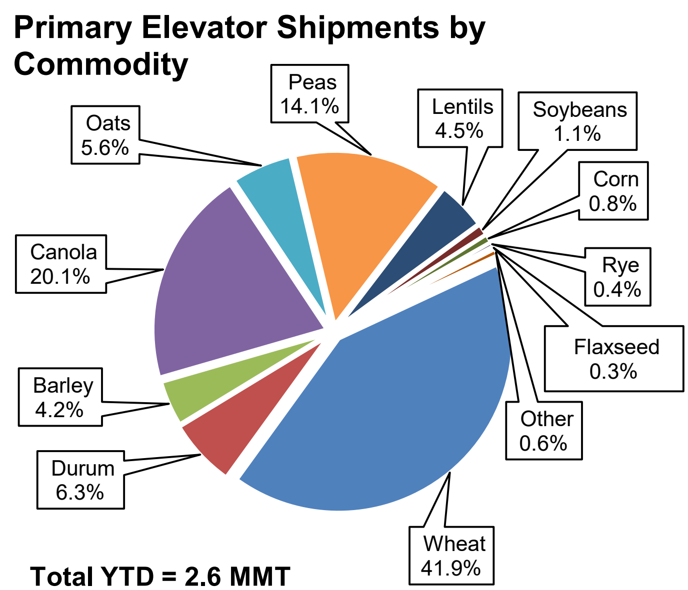
When coupled with July 2025's 6.4 MMT of carry-forward stocks, some 24.1% less than in 2024, the overall grain supply is estimated at 81.0 MMT. This stands 1.6% lower than the 2024-25 crop year's 82.3-MMT level, heralding relatively good supplies to meet domestic and export demands.

Table M-2	2025*	2024	Var. from Last Yr.
Production & Carry Forward (000's tonnes)			
*** Western Canada Total Production - Preliminary**	74,582.4	73,846.1	1.0%
Western Canada On-Farm & Primary-Elevator Carry Forward Stock	6,413.2	8,450.3	-24.1%
Total Grain Supply	**80,995.6**	**82,296.4**	**-1.6%**

Traffic and Movement

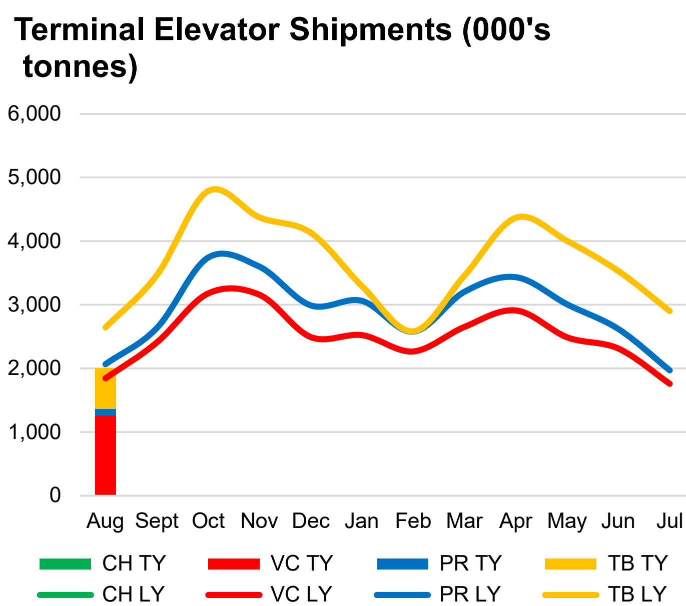
August producer deliveries increased from July's 0.5 MMT to an average of 0.8 MMT per week as harvest got underway. Average weekly primary-elevator stocks fell to 2.2 MMT in August, with good space in the elevator system.

Table M-3	AUG 2025	2025-26 YTD	Var. from Last YTD
Primary Elevator Shipments (000's tonnes)			
Manitoba	660.2	660.2	23.8%
Saskatchewan	1,220.4	1,220.4	-26.8%
Alberta	675.5	675.5	-38.2%
British Columbia	11.4	11.4	-33.3%
Total	**2,567.5**	**2,567.5**	**-22.5%**
Western Canada Railway Traffic (000's tonnes)			
Shipments to Western Ports	2,411.9	2,411.9	-17.7%
Shipments to Eastern Canada	142.4	142.4	-3.7%
Shipments to US & Mexico	577.8	577.8	-0.2%
Shipments Western Domestic	114.7	114.7	52.4%
Total	**3,246.7**	**3,246.7**	**-13.0%**
Western Port Unloads (Number of Cars)			
Vancouver	13,138	13,138	-35.3%
Prince Rupert	510	510	-63.6%
Churchill	0	0	n/a
Thunder Bay	5,865	5,865	31.3%
Total	**19,513**	**19,513**	**-25.4%**
Terminal Elevator Shipments (000's tonnes)			
Vancouver	1,266.5	1,266.5	-31.4%
Prince Rupert	106.3	106.3	-52.3%
Churchill	0.0	0.0	n/a
Thunder Bay	627.1	627.1	8.4%
Total	**1,999.9**	**1,999.9**	**-24.5%**



GMP Data Table 2A-1

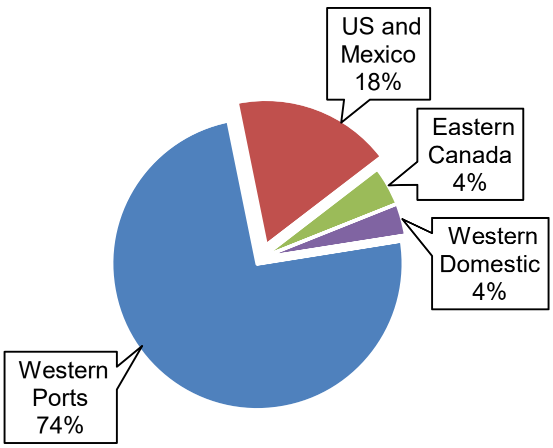
Grain shipments from primary elevators in the first month of the crop year were down 22.5% from the previous year. Wheat, including durum, and canola constitute the largest proportion of the movement at 68.4%. Movement of peas and lentils contributed 18.6% of the total.



GMP Data Table 2C-1

Overall bulk grain shipments from western ports have declined 24.5% on a year-over-year basis. Crop year to date, Vancouver shipments are down 31.4 and Prince Rupert shipments are down by 52.3%. Only the Port of Thunder Bay recorded a year-over-increase in shipments, up 8.4% from August 2024.

Western Canadian Grain Destinations

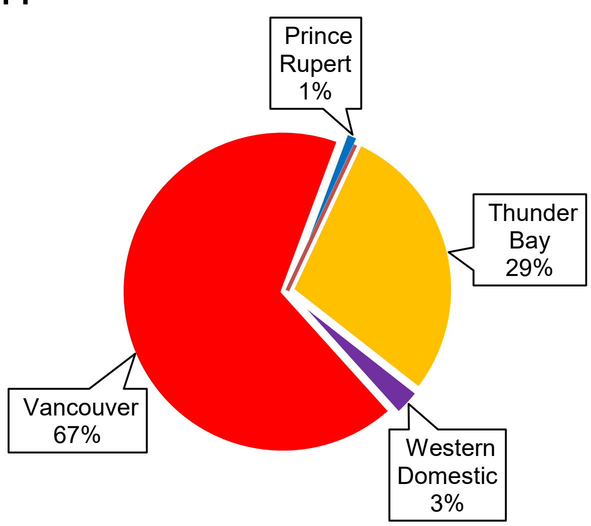


Total YTD = 3.2 MMT

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

Railway grain shipments from Western Canada totaled over 3.2 MMT in the opening month of the 2025-26 crop year, a 13.0% decrease from the 3.7 MMT handled in the same period a year earlier. The majority, about 2.4 MMT, was directed to Western Canadian ports, which saw a 17.7% decrease in volume. This was amplified by decreases of 3.7% in shipments to Eastern Canada and a more marginal 0.2% on those into the US and Mexico. Conversely, Western Domestic volumes rose by 52.4%.

Western Canadian Destined Hopper Car Traffic

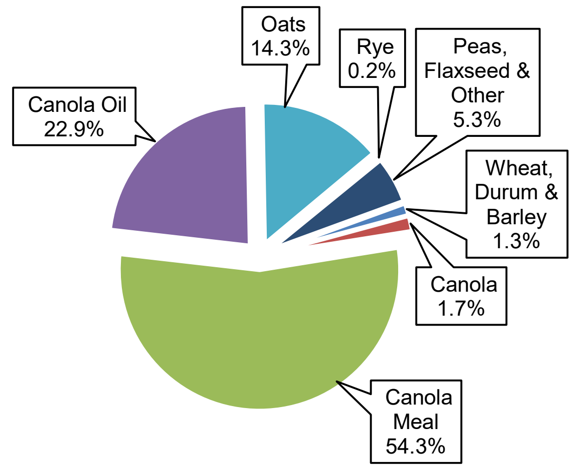


Total YTD = 2.4 MMT

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 month of the 2025-26 crop year this amounted to slightly under 2.4 MMT, down 18.0% from the previous year. Sixty-seven 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 fell by 31.0%. This downturn in west-coast traffic was supported by a significantly sharper 68.0% decline in Prince Rupert volumes. However, these losses were partially offset by a 57.7% increase in Thunder Bay traffic as well as a 27.5% gain in Western Domestic shipments.

US Destined Grain by Commodity

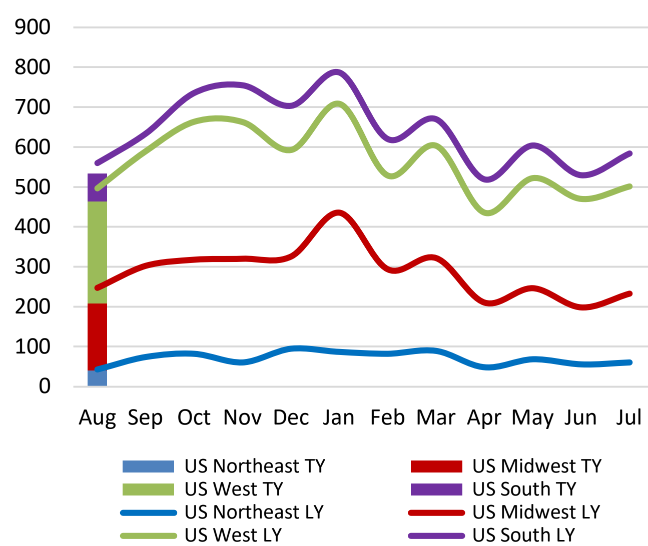


Total YTD = 0.5 MMT

GMP Data Table 2B-18

Total railway shipments into the US reached over 0.5 MMT in the first month of the 2025-26 crop year, down 4.8% from that moved in the same period a year earlier. Just under 79% of these shipments were directed into the US Midwest and West, with canola and canola products dominating.

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



GMP Data Table 2B-18

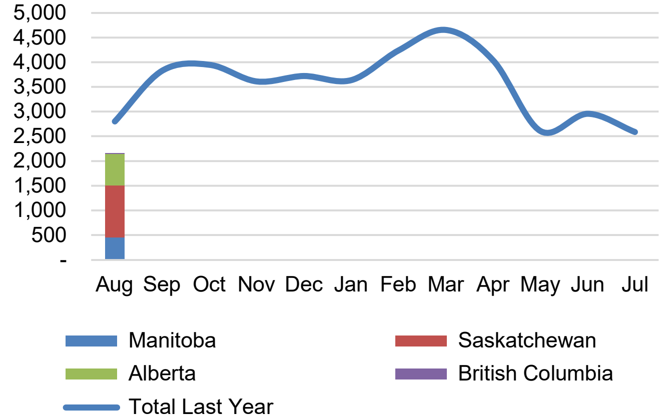
System Efficiency and Performance

Primary elevator stocks decreased in August, averaging 2.2 MMT as harvest advanced in the latter part of the month. Overall space in the country system was good. Country stocks utilized just 41% of the working capacity of the network. By province, stocks ranged from 39% and 40% in Alberta and Saskatchewan respectively to 43% in Manitoba, and 62% in British Columbia.

The average days-in-store in the primary-elevator system for the first month of the crop year decreased from the same period last year, falling by 8.4% to 24.0 days.

Table M-4	AUG 2025	2025-26 YTD	Var. from Last YTD
Primary Elevator			
Average Weekly Stocks (000's tonnes)	2,155.6	2,155.6	-23.1%
Average Days in Store	24.0	24.0	-8.4%
Railway Operations (days)			
Cycle Time to Western Ports	14.4	14.4	-18.2%
Cycle Time to Eastern Canada	26.7	26.7	-5.7%
Cycle Time to US	25.7	25.7	-12.3%
Loaded Transit to Western Ports	4.8	4.8	-31.5%
Loaded Transit to Eastern Canada	11.2	11.2	-5.0%
Loaded Transit to US	10.1	10.1	4.8%
Rail Fleet in Grain Service	10,225	10,225	-11.5%
Western Canada Terminal Elevator			
Average Weekly Stocks (000's tonnes)	955.9	955.9	-2.6%
Average Days in Store	15.3	15.3	24.4%
Port Unloads (hopper cars)	19,513	19,513	-25.4%
Terminal Out-of-Car Time	7.7%	7.7%	-55.0%
Western Canada Port Operations			
Average Vessel Time in Port (days)	4.3	4.3	-52.2%

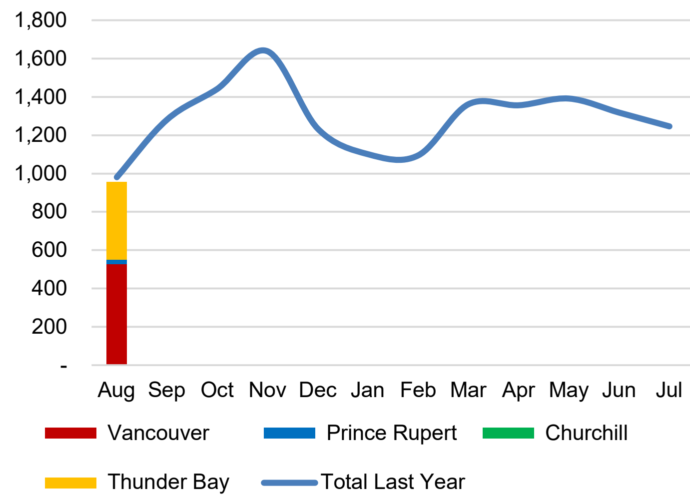
Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.6 MMT in-store. 2025-26 began with stocks falling to 2.2 MMT throughout August. Wheat, including durum, and canola, comprise 51% of the total stock. At 29% of the stock, barley, oats and peas made up much of the balance.

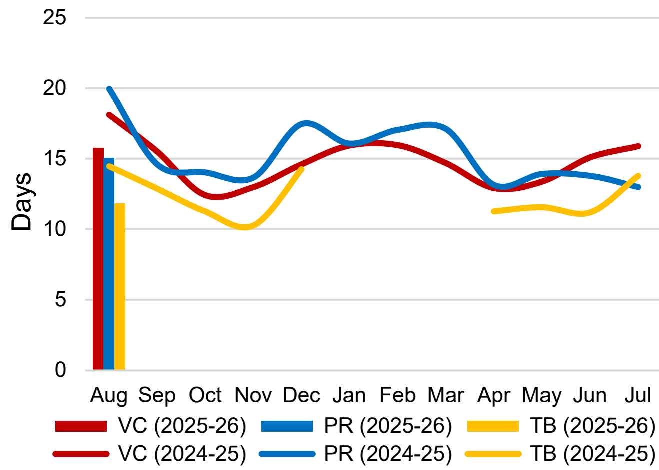
Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged just under 1.0 MMT in August, down almost 0.3 MMT from those in-store during July. Relative to August 2024, stocks were down on the west coast, where Vancouver was down 8.6% and Prince Rupert was down 51.1%. Thunder Bay stocks were higher year-over-year by 14.0%. Wheat, including durum, and canola, comprise 77% of the total stock. In August, western ports utilized just under 50% of their overall working capacity.

Railway Cycle Times to Western Ports (days)

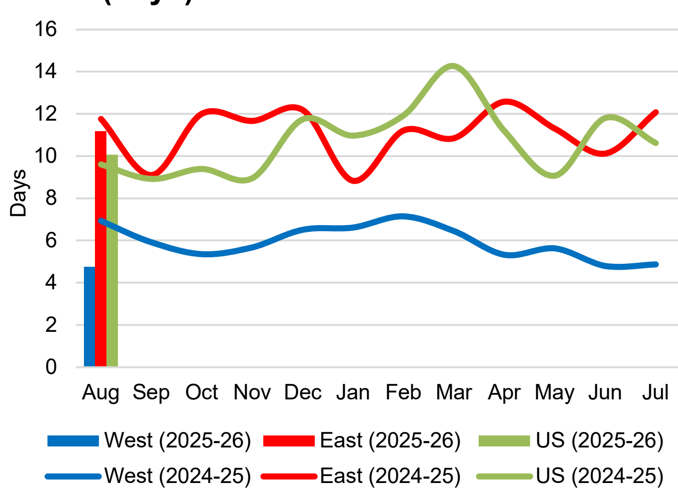


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 14.4 days in the opening month of the 2025-26 crop year, down 18.2% from the 17.7-day average reported a year earlier. This result was largely shaped by a 13.1% decrease in the Vancouver corridor average and supported by reductions of 24.6% in the Prince Rupert average, and 18.1% in the Thunder Bay average.

The average for movements into Eastern Canada also fell, albeit by a lesser 5.7%, to an average of 26.7 days from 28.3 days a year earlier. A 12.3% decrease was noted in the cycle for US movements, which fell to an average of 25.7 days from 29.3 days the previous year.

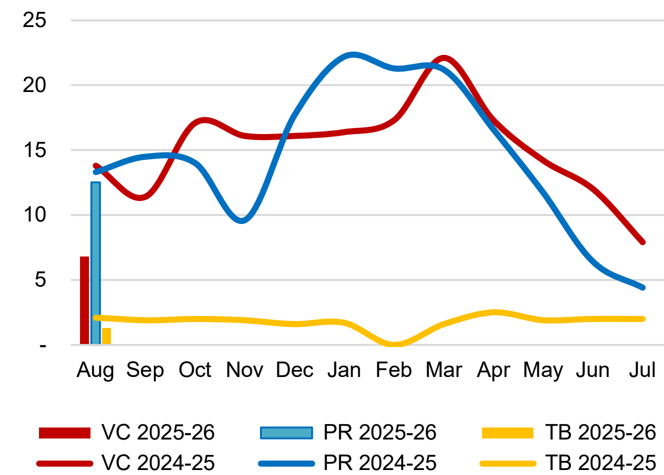
Average Loaded Transit Times (days)



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

Loaded transit time for traffic destined to Western Canadian ports averaged 4.8 days in the first month of the 2025-26 crop year, down 31.5% from the 6.9-day average posted the previous year. This was primarily driven by a 30.3% decrease in the Vancouver-corridor average but aided by equally sharp reductions in the Prince Rupert and Thunder Bay corridor averages, which fell by 29.1% and 23.1% respectively. The average into Eastern Canada declined by a more modest 5.0%, to 11.2 days from 11.8 days a year earlier. Conversely, the average on US-destined traffic rose by 4.8%, to 10.1 days from 9.6 days.

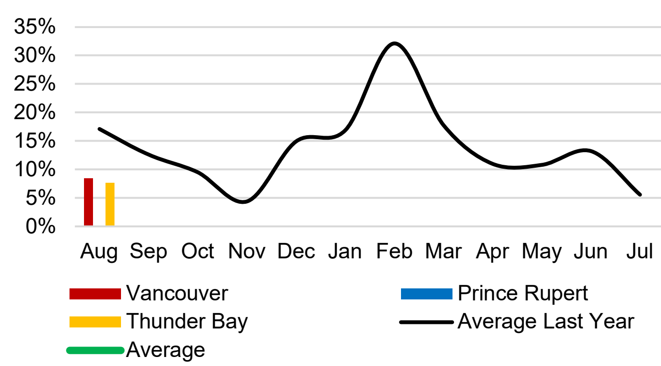
Average Days in Port per Vessel



GMP Data Table 5D-1

In August, the overall-average time vessels were in port waiting and loading grain was 4.3 days, 52.2% less than was the case in August 2024. In August, the average days in port stood at 6.8 days for Vancouver and 12.5 days for Prince Rupert. At Thunder Bay, the average time vessels were in port was 1.3 days.

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

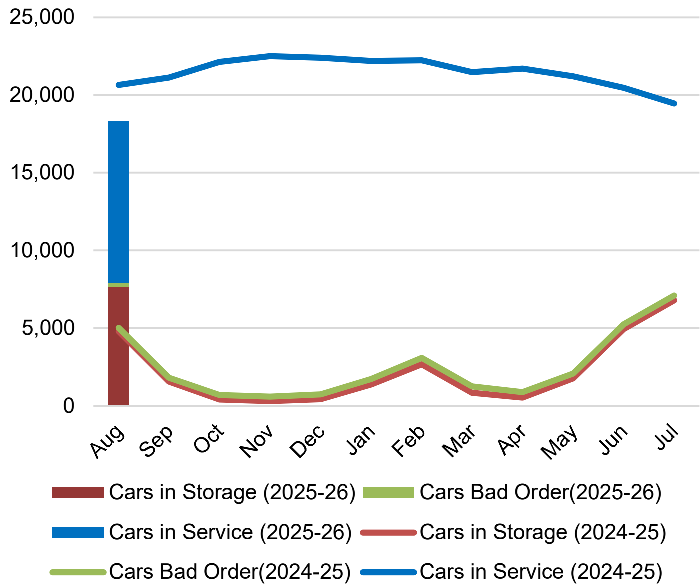


GMP Data Table 5C-5

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 rose to 7.7% in August, from 5.6% in July. Month-over-month, terminal out-of-car time rose to 8.4% at Vancouver, held constant at 0.0% at Prince Rupert, and rose to 7.6% at Thunder Bay.

Railway Grain Fleet Size and Utilization

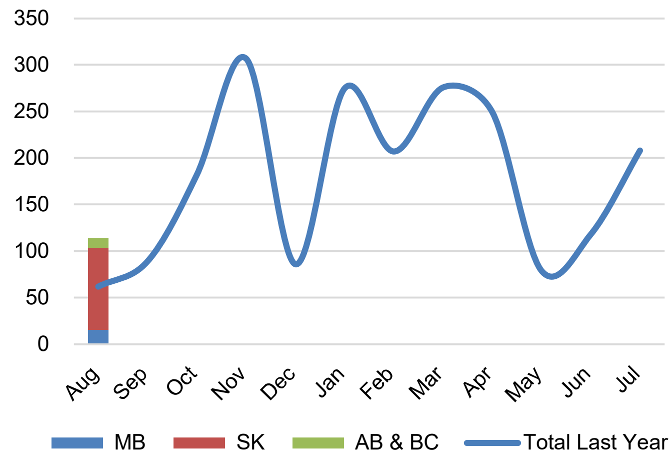


GMP Data Table 3B-2

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. The 2024-25 crop year ended with 12,344 cars in service in July 2025 which represented 63% of the fleet. Owing to a slower start to the crop year, 2025-26 began with only an average of 10,225 cars in service every week throughout August. Only 56% 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 August 2025 were 83.9% higher than those in August a year earlier. Producer cars loaded in Manitoba and Saskatchewan saw the largest year-over-year increases at 100% and 91.3%, respectively. Year to date, oats comprise 47% of the movement, wheat and durum comprise just 46% of the year-to-date totals. Thus far in the crop year, 53% of producer cars were shipped to destinations within Canada and the remaining 47% 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

Quorum welcomes questions and comments on the reports and data. Please contact us by either phone or email