

GMP Dashboard

Table M-1	NOV 2025	DEC 2025	2025-26 YTD	Var. from Last YTD
Western Canadian GHTS Performance (Days)				
Total Time in System	37.1	42.0	38.5	-2.3%
Average Days In Store – Country	20.4	23.7	21.6	-4.8%
Loaded Transit Time	5.1	5.5	5.1	-15.3%
Average Days In Store – Terminal	11.6	12.8	11.8	10.3%
Total Traffic ('000 tonnes)				
Primary Elevator Shipments	4,986.8	4,706.3	23,496.8	2.3%
Railway Shipments (all Western Canada traffic)	6,042.4	5,297.8	26,770.9	1.3%
Western Port Terminal Shipments	4,685.4	4,337.3	19,569.8	1.4%
Railway Performance				
Avg. Loads on Wheels (Cars)	10,163	10,031	8,862	-13.0%
Total Western Port Car Cycle (days)	11.9	12.2	12.8	-8.9%
Port Performance				
Western Port Unloads (Number of Cars)	46,992	39,279	198,001	1.2%
Vessel Time in Port (days)	6.6	8.7	7.0	-27.1%

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 fell by 12.3% in December 2025, decreasing to about 5.3 MMT from the 6.0 MMT reported in November. Year-to-date tonnage increased by 1.3%, to almost 26.8 MMT from the 26.4 MMT handled in the same five-month period a year earlier. Port shipments for December totaled 4.3 MMT, a 7.4% decrease from November. Year-to-date tonnage at 19.6 MMT is ahead of the same period last year, by 1.4%. The month-over-month decrease in shipments was accompanied by an increase in the average amount of time vessels spent in port, which grew to 8.7 days from 6.6 days in November.

Highlights for December 2025

Traffic and Movement (page 2)

- Primary-elevator shipments were 23.5 MMT in the first five months of the 2025-26 crop year, 2.3% 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 2025-26 crop year totaled slightly under 26.8 MMT, up 1.3% from the same period a year earlier.
- Bulk grain shipments from Western Canadian ports totaled 19.6 MMT in the first five months of the crop year, 1.4% above the same period last year.

System Efficiency and Performance (page 4)

- The year-to-date average weekly primary-elevator stocks shrank by 5.1% while the average days-in-store decreased by 4.8%.
- Average weekly port-terminal stocks were 9.9% higher than the same period last year, while average days-in-store grew by 10.3% on a year-over-year basis.
- The preliminary average car cycle for hopper-car movements to Western Canadian ports in December 2025 rose to 12.2 days from the 11.9 days recorded in November. Comparatively faster velocities in the opening months of the 2025-26 crop year also helped lower the year-to-date average by 8.9%, to 12.8 days from the 14.1 days posted a year earlier. Conversely, the average for movements into Eastern Canada rose by 2.8%, to 26.0 days. Similarly, a 9.0% increase was observed in the average for movements into the US, which rose to 27.0 days.
- The year-to-date average for vessel time in port is 7.0 days, 27.1% less than the same period last year.
- Port-terminal out-of-car time rose in December at Vancouver to 10.1% (from 5.0%) and at Thunder Bay to 9.6% (from 0.6%). Prince Rupert saw a decrease from November's 10.1% to 4.1% in December. The combined year-to-date value of 8.9% out-of-car time was 23.3% lower than the same period in the 2024-25 crop year.

Production and Supply

Statistics Canada's December estimate for 2025 field-crop production in Western Canada stands at 85.4 MMT, a 15.7% increase from 2024's 73.8 MMT harvest. With the latest estimate, the 2025 harvest is the largest on record, exceeding the previous record of 78.8 MMT set in 2020.

When coupled with 6.6 MMT of carry-forward stocks, 22.4% less than in 2024, the overall grain supply is estimated at 92.0 MMT. This stands 11.8% higher than the 2024-25 crop year's 82.3-MMT level and marks the first time the total supply has exceeded 90.0 MMT.



Table M-2	2025	2024	Var. from Last Yr.
Production & Carry Forward (000's tonnes)			
Western Canada Total Production	85,427.9	73,846.1	15.7%
Western Canada On-Farm & Primary-Elevator Carry Forward Stock	6,556.2	8,450.3	-22.4%
Total Grain Supply	91,984.1	82,296.4	11.8%

Traffic and Movement

December producer deliveries fell to a weekly average of 0.8 MMT, exhibiting the typical slowdown throughout the holiday period. Average weekly primary-elevator stocks fell to 3.4 MMT in December, with good space in the elevator system.

Table M-3	DEC 2025	2025-26 YTD	Var. from Last YTD
Primary Elevator Shipments (000's tonnes)			
Manitoba	706.1	4,350.3	2.5%
Saskatchewan	2,665.7	12,270.8	5.3%
Alberta	1,306.6	6,757.6	-2.8%
British Columbia	27.9	118.1	-1.3%
Total	4,706.3	23,496.8	2.3%

Western Canada Railway Traffic (000's tonnes)

Shipments to Western Ports	4,185.7	21,967.6	1.9%
Shipments to Eastern Canada	240.0	838.5	0.3%
Shipments to US & Mexico	717.8	3,356.7	-7.5%
Shipments Western Domestic	154.2	608.1	49.0%
Total	5,297.8	26,770.9	1.3%

Western Port Unloads (Number of Cars)

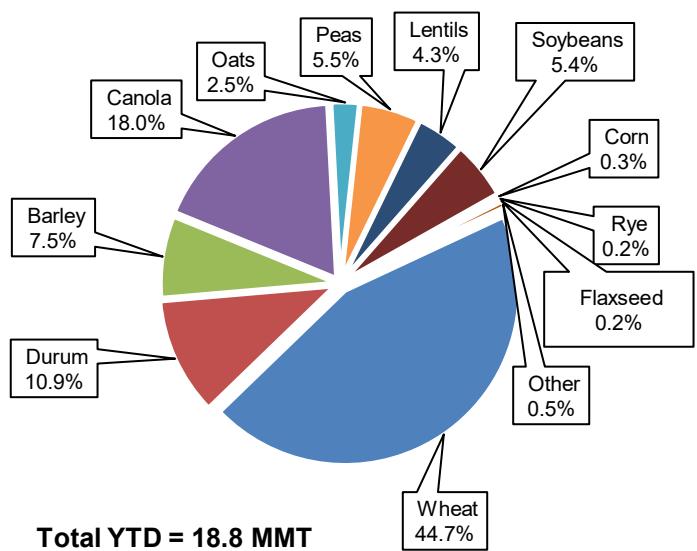
Vancouver	26,394	131,040	-1.3%
Prince Rupert	5,358	21,032	4.8%
Churchill	0	0	n/a
Thunder Bay	7,527	45,292	7.0%
Total	39,279	158,441	1.2%

Terminal Elevator Shipments (000's tonnes)

Vancouver	2,714.1	13,013.9	-0.4%
Prince Rupert	480.3	1,956.9	0.4%
Churchill	0.0	0.0	n/a
Thunder Bay	1,142.9	4,689.0	7.3%
Total	4,337.3	19,569.8	1.4%



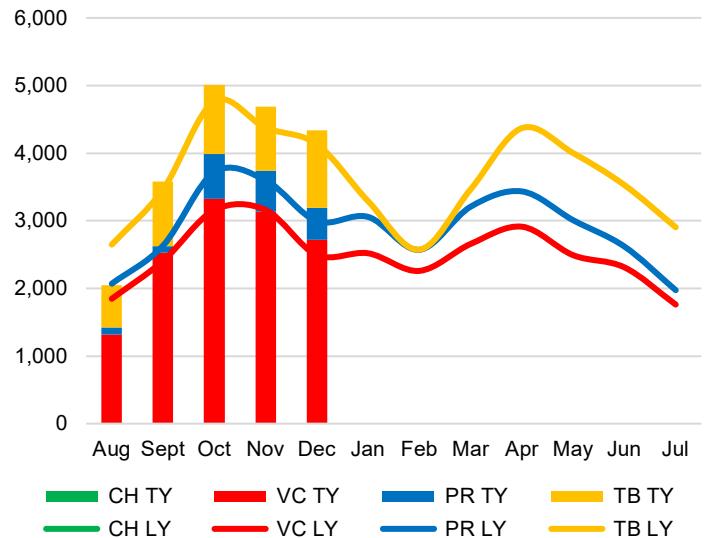
Primary Elevator Shipments by Commodity



GMP Data Table 2A-1

Grain shipments from primary elevators in the first five months of the crop year were up 2.3% from the previous year. Wheat, including durum, and canola constitute the largest proportion of the movement at 73.6%. Movement of peas and lentils contributed 9.8% of the total.

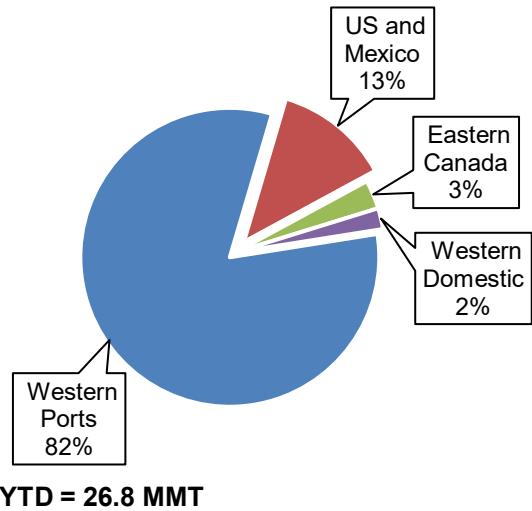
Terminal Elevator Shipments (000's tonnes)



GMP Data Table 2C-1

Overall bulk grain shipments from western ports through the first five months of 2025-26 are up 1.4% on a year-over-year basis. Crop year to date, Vancouver shipments are down 0.4% while shipments out of Prince Rupert and Thunder Bay are up 0.4% and 7.3% respectively.

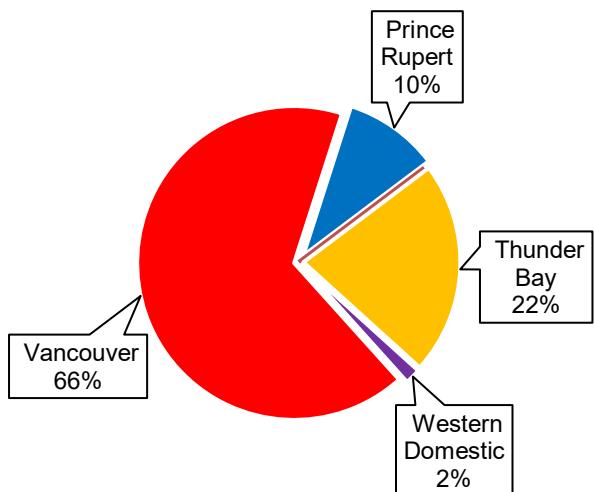
Western Canadian Grain Destinations



[GMP Data Tables 2B-1, 2B-8 & 2B-15](#)

Railway grain shipments from Western Canada totaled just under 26.8 MMT in the first five months of the 2025-26 crop year, a 1.3% increase from the 26.4 MMT handled in the same period a year earlier. The majority, about 22.0 MMT, was directed to Western Canadian ports, which saw a 1.9% increase in volume. This gain was tempered by a marginal 0.3% increase in shipments to Eastern Canada and a 7.5% reduction on those into the US and Mexico. A substantive 49.0% increase was noted on the movement of Western Domestic volumes.

Western Canadian Destined Hopper Car Traffic

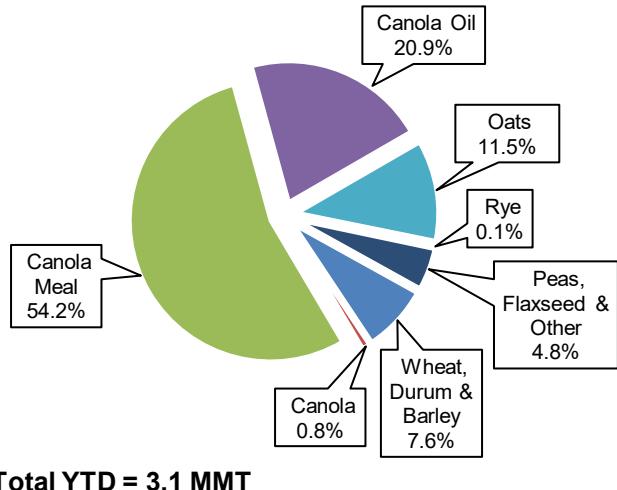


[GMP Data Tables 2B-3 to 2B-7](#)

Over 95% of the tonnage directed to destinations within Western Canada moves in covered hopper cars. In the first five months of the 2025-26 crop year this amounted to slightly under 21.7 MMT,

up 2.0% from the previous year. Sixty-six percent of these hopper cars were destined for 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 0.2%, to 14.4 MMT, while Prince Rupert volumes rose by 2.2%, to 2.1 MMT. Increases were observed in Thunder Bay traffic as well as Western Domestic shipments, which rose by 8.3% and 13.4% respectively.

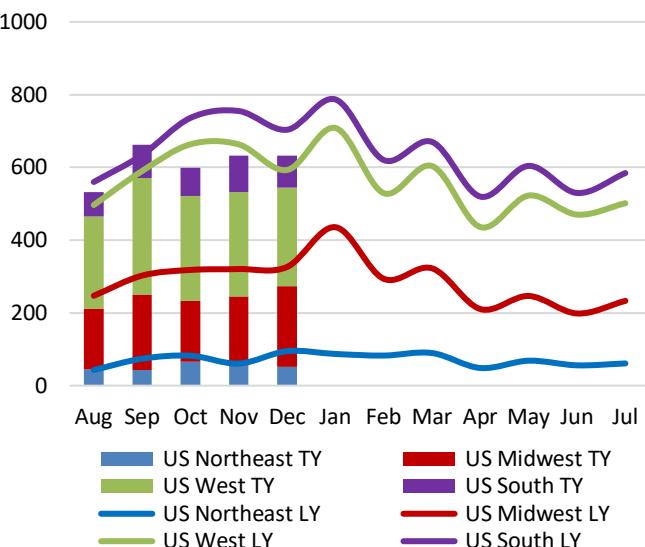
US Destined Grain by Commodity



[GMP Data Table 2B-18](#)

Total railway shipments into the US reached almost 3.1 MMT in the first five months of the 2025-26 crop year, down 9.7% from the 3.4 MMT handled the year before. A little under 78% 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

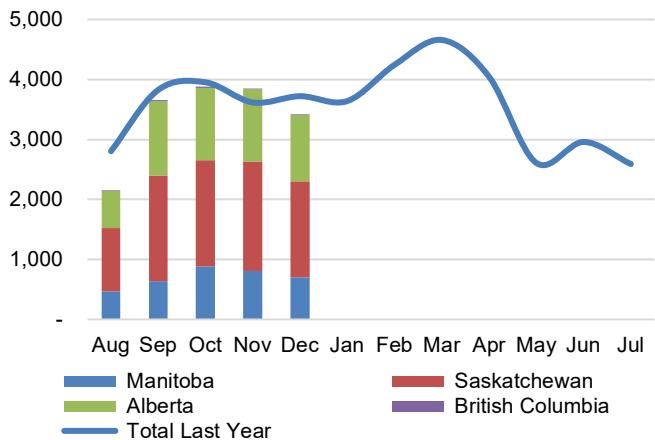
Primary elevator stocks decreased in December, averaging 3.4 MMT throughout the month. Overall space in the country system was good. Country stocks utilized 64% of the working capacity of the network. By province, stocks ranged from 43% in British Columbia to 61%, 66%, and 68% in Saskatchewan, Manitoba, and Alberta, 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 by 4.8% to 21.6 days.

Table M-4	DEC 2025	2025-26 YTD	Var. from Last YTD
Primary Elevator			
Average Weekly Stocks (000's tonnes)	3,417.9	3,416.7	-5.1%
Average Days in Store	23.7	21.6	-4.8%
Railway Operations (days)			
Cycle Time to Western Ports	12.2	12.8	-8.9%
Cycle Time to Eastern Canada	20.7	26.0	2.8%
Cycle Time to US	24.6	27.0	9.0%
Loaded Transit to Western Ports	5.5	5.1	-15.3%
Loaded Transit to Eastern Canada	9.1	11.8	6.4%
Loaded Transit to US	10.4	10.0	3.3%
Rail Fleet in Grain Service	19,680	17,614	-12.5%
Western Canada Terminal Elevator			
Average Weekly Stocks (000's tonnes)	1,606.1	1,453.5	9.9%
Average Days in Store	12.8	11.8	10.3%
Port Unloads (hopper cars)	39,279	198,001	1.2%
Terminal Out-of-Car Time	9.4%	8.9%	-23.3%
Western Canada Port Operations			
Average Vessel Time in Port (days)	8.7	7.0	-27.1%



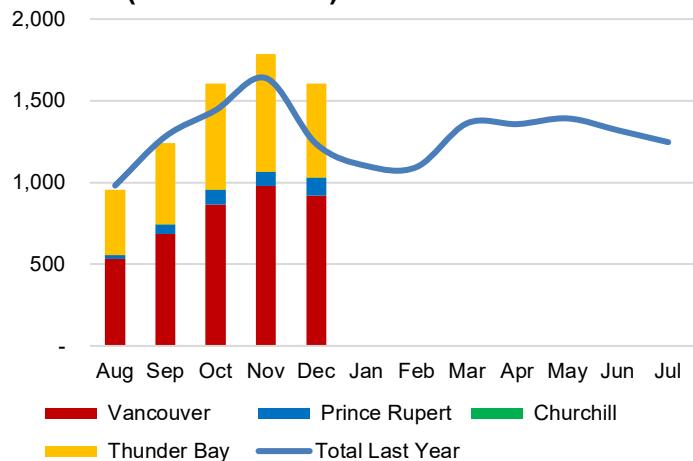
Average Weekly Primary Elevator Stocks (000's tonnes)



GMP Data Table 5A-2

Primary elevator stocks ended the last crop year averaging 2.6 MMT in-store. 2025-26 began slowly with stocks falling to 2.2 MMT throughout August but quickly rising to 3.9 MMT as harvest completed in October. December saw stocks start to come down, averaging 3.4 MMT per week. Wheat, including durum, and canola, comprise 60% of the total stock. At 20% of the stock, barley, oats and peas made up much of the balance.

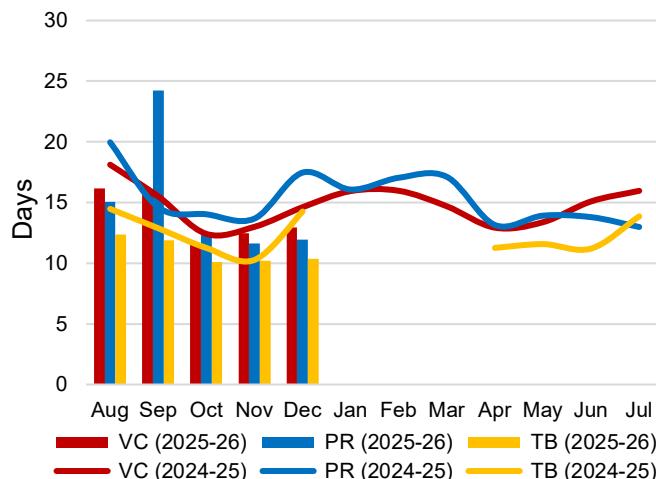
Average Weekly Terminal Elevator Stocks (000's tonnes)



GMP Data Table 5C-2

Overall terminal elevator stocks averaged 1.6 MMT in December, down from 1.8 MMT in-store during November. Throughout December, the aggregate stock numbers for Vancouver terminals were consistently above 90% of the working capacity. Compared to December 2024, Vancouver stocks were up 12.5%, Prince Rupert down 27.2%, and Thunder Bay stocks were up 14.0%. Wheat, including durum, and canola, comprise 77% of the total stock. In November, western ports used 83% of their overall working capacity.

Railway Cycle Times to Western Ports (days)

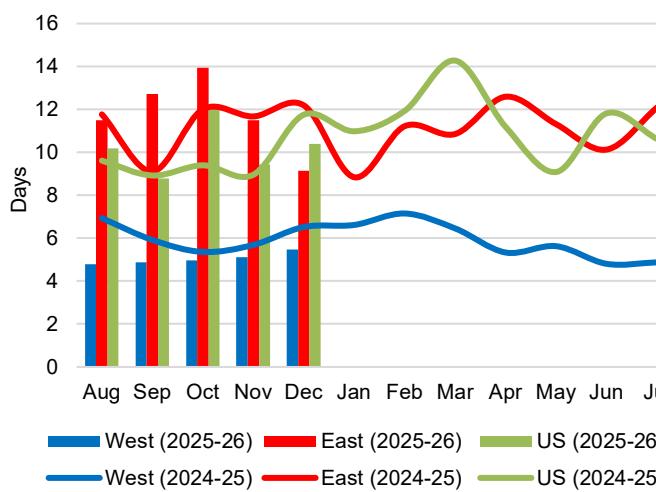


GMP Data Table 5B-1

Railway car cycles to Western Canadian ports averaged 12.8 days in the first five months of the 2025-26 crop year, down 8.9% from the 14.1-day average reported a year earlier. This result was largely shaped by a 7.0% decrease in the Vancouver corridor average and supported by reductions of 11.6% in the Prince Rupert corridor average, and 11.9% in the Thunder Bay corridor average.

Conversely, the average for movements into Eastern Canada rose by 2.8%, to an average of 26.0 days from 25.3 days a year earlier. A greater 9.0% increase was noted in the car cycle for US movements, which rose to an average of 27.0 days from 24.8 days the previous year.

Average Loaded Transit Times (days)

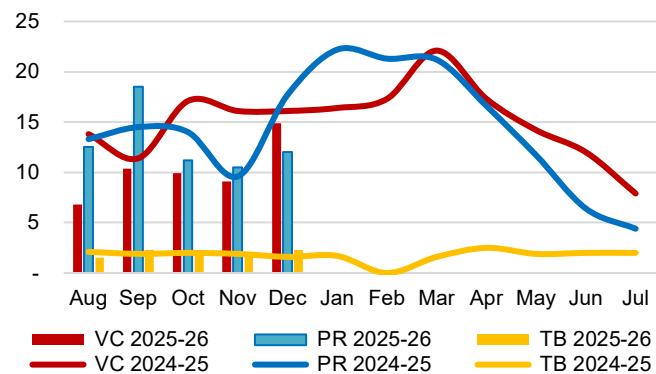


GMP Data Tables 5B-4, 5B-8, 5B-12

Loaded transit time for traffic destined to Western Canadian ports averaged 5.1 days in the first five months of the 2025-26 crop year, down 15.3% from the 6.0-day average posted the previous year. This was primarily driven by a 14.7% decrease in the Vancouver-corridor average but aided by reductions in the Prince

Rupert and Thunder Bay corridor averages, which fell by 17.7% and 13.1% respectively. Opposing these improvements were increases to the average on movements into Eastern Canada, which rose by 6.4%, to 11.8 days from 11.1 days a year earlier, and on US-destined traffic, which increased by 3.3%, to 10.0 days from 9.7 days.

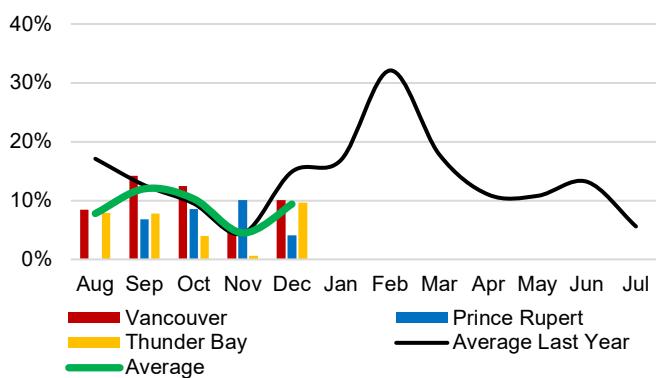
Average Days in Port per Vessel



GMP Data Table 5D-1

In December, the overall-average time vessels were in port waiting and loading grain was 8.7 days, 7.4% less than was the case in December 2024. The average days in port stood at 14.9 days for Vancouver, 12.0 days for Prince Rupert, and 2.3 days for Thunder Bay. Each western port saw an increase in its time in port measure from that in November.

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



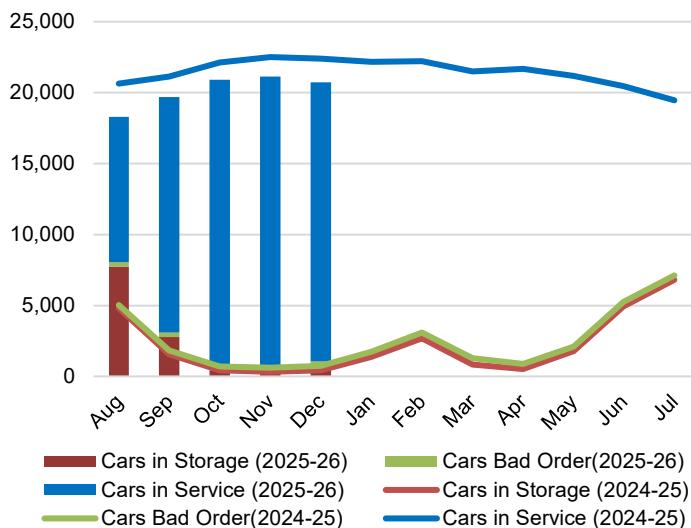
GMP Data Table 5C-5

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 9.4% in December, from 4.5% in November. Month-over-month, terminal out-of-car time rose to 10.1% at Vancouver, fell to 4.1% at Prince Rupert, and grew to 9.6% at Thunder Bay.



Railway Grain Fleet Size and Utilization

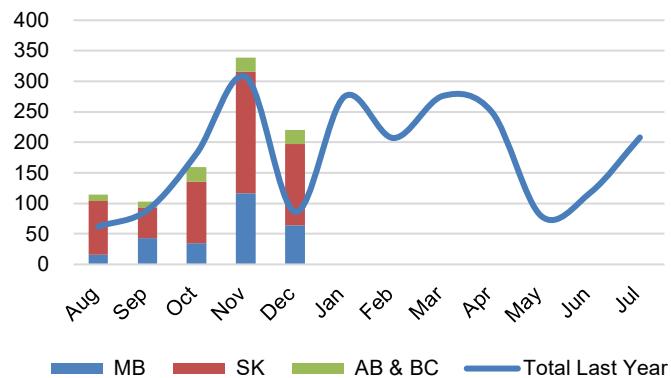


GMP Data Table 3B-2

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. Owing to a slower start to harvest, 2025-26 began with an average of only 10,225 cars in service every week throughout August. This reversed quickly in September, and increased every month until December, which had 19,680 cars in service, down from November's average of 20,359 cars. December had 95% of the overall fleet 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 2025 were 155.8% higher than those in December a year earlier. Year-to-date, producer cars loaded in Saskatchewan were up 63.8% over the same period last year. The number of cars loaded in Manitoba was down 11.9% while Alberta & British Columbia registered a 36.4% increase. Year to date, oats comprise 55% of the movement, while wheat and durum comprise 37% of the year-to-date totals. Thus far in the crop year, 42% of producer cars were shipped to destinations within Canada and the remaining 58% to the United States.



Quorum Corporation
 Suite 550, 11150 Jasper Avenue
 Edmonton, AB T5K 0C7
 Email: info@quorumcorp.net
 Web: www.grainmonitor.ca
 Phone: (780) 447-2111

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