



# Western Canada GHTS Update ICS Annual Conference

November 18, 2021



# General Performance

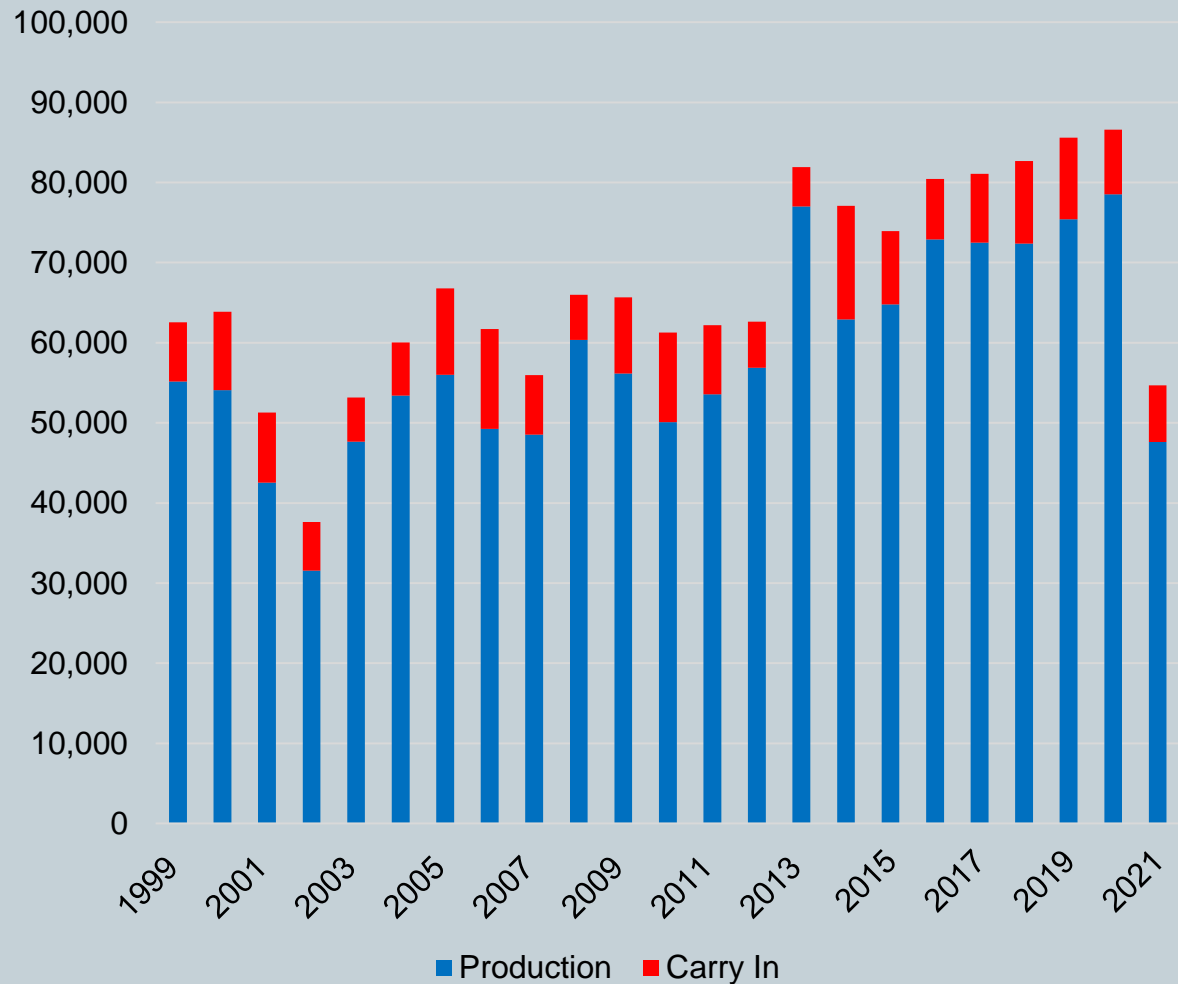
## 2020-21 Records Set

- Production = 78.5 MMT
- Total movement = 63.6 MMT
- Total Port Shipments = 44.7 MMT

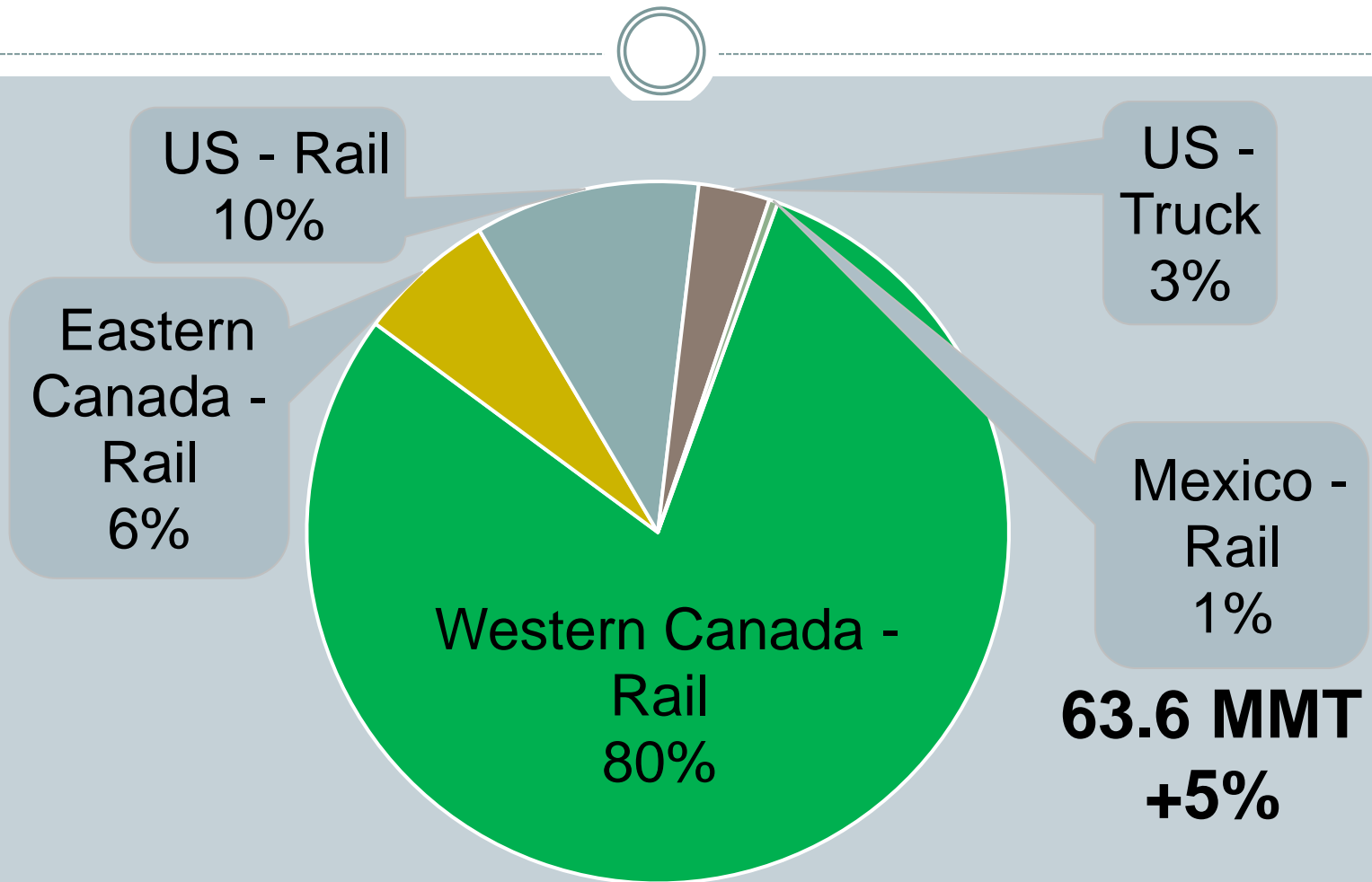
## Slight improvements in:

- Car Cycle
- Vessel line up
- Vessel time in port

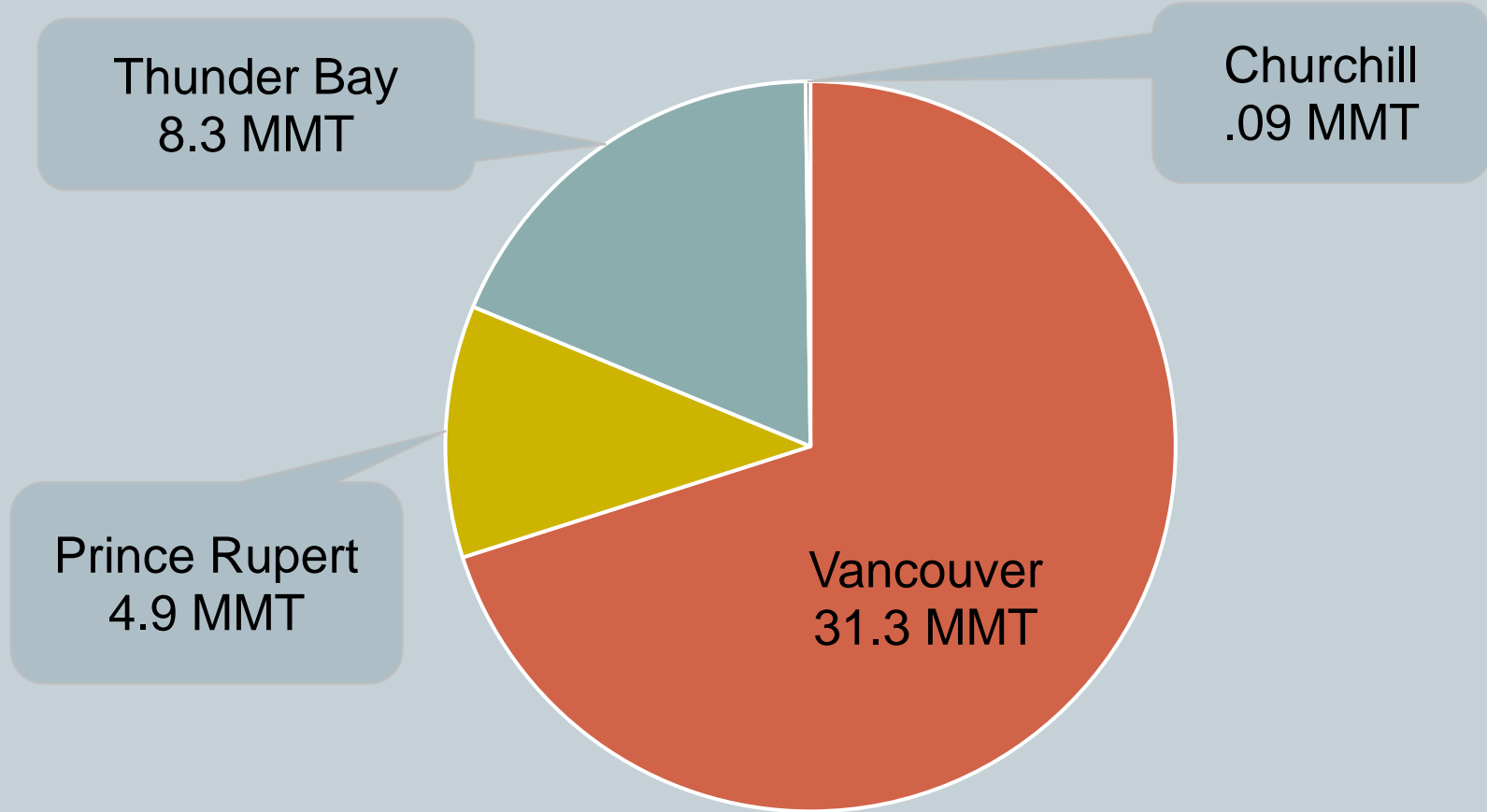
## Production & Supply



# Total Movement: 2020-21 CY

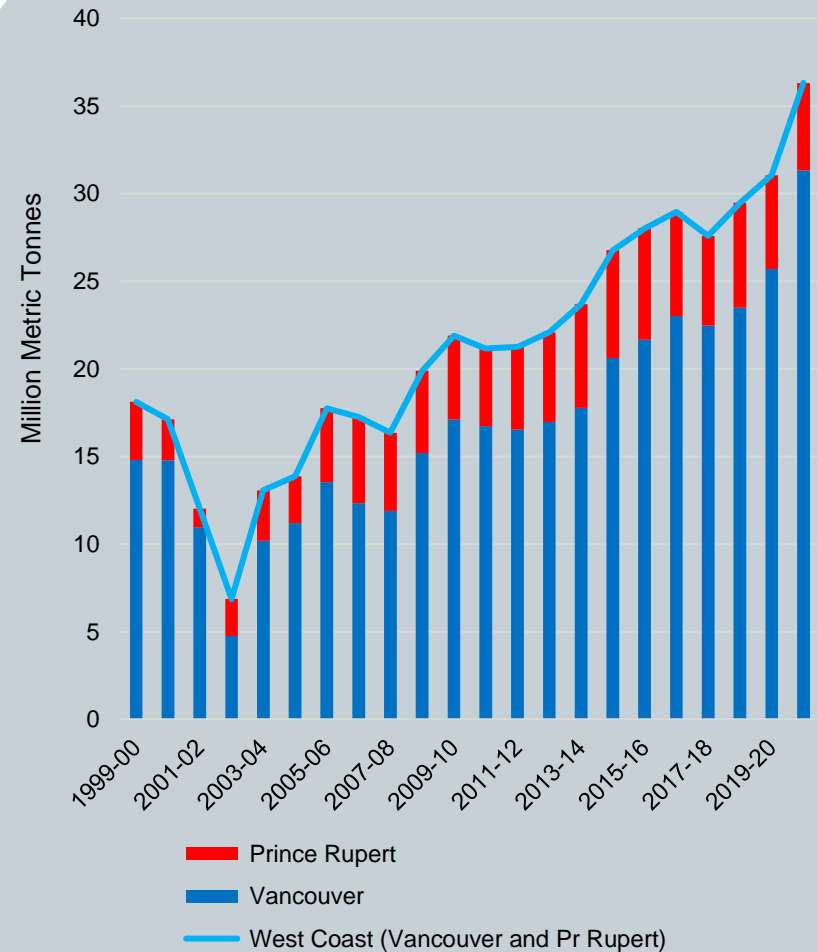


# Western Port Shipments: 2020-21 CY

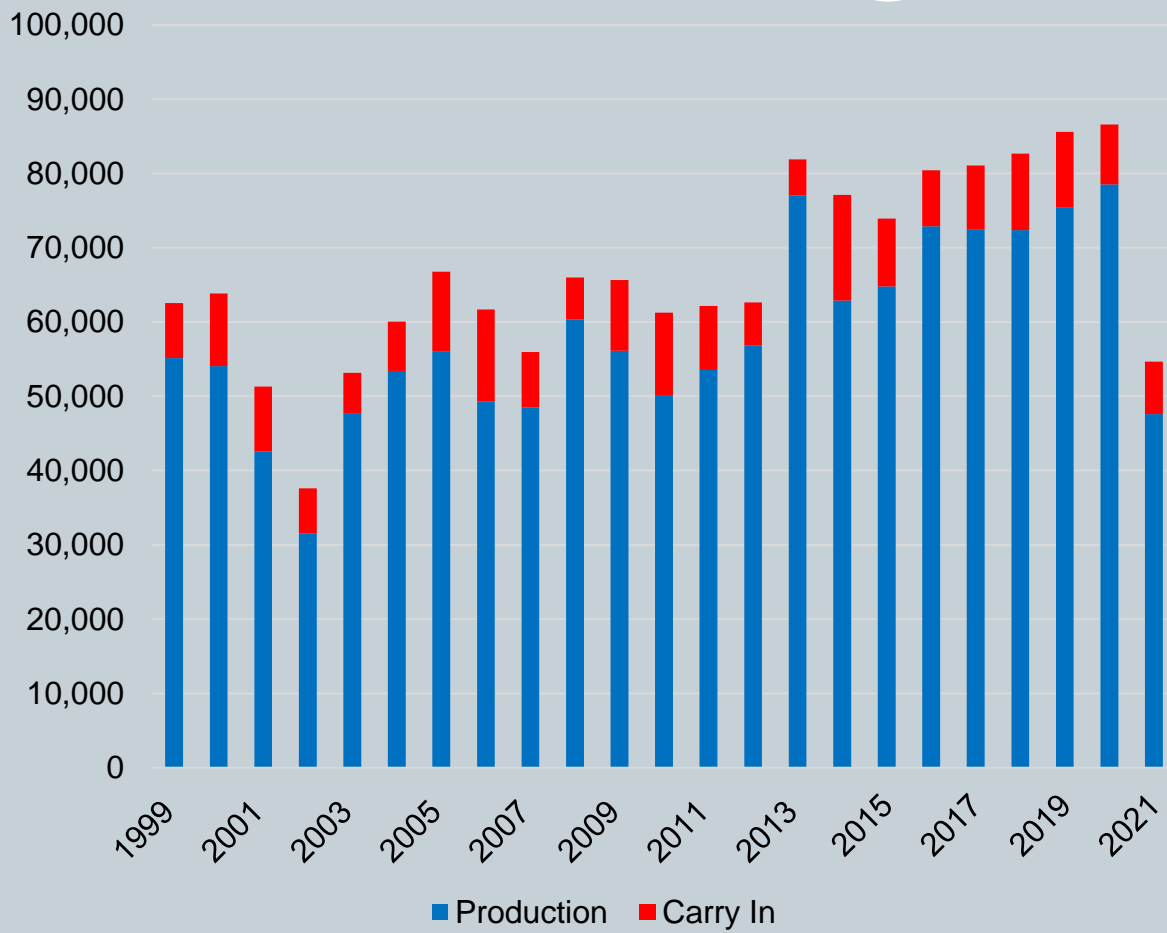


# West Coast Bulk Shipments

- West Coast volumes were up 16.9% over last CY
  - Vancouver up 21.9%
  - Prince Rupert down 7%
- 5 yr growth of 5% annually
- Reflects the increased terminal capacity at Vancouver
  - G3
  - Fraser Grain



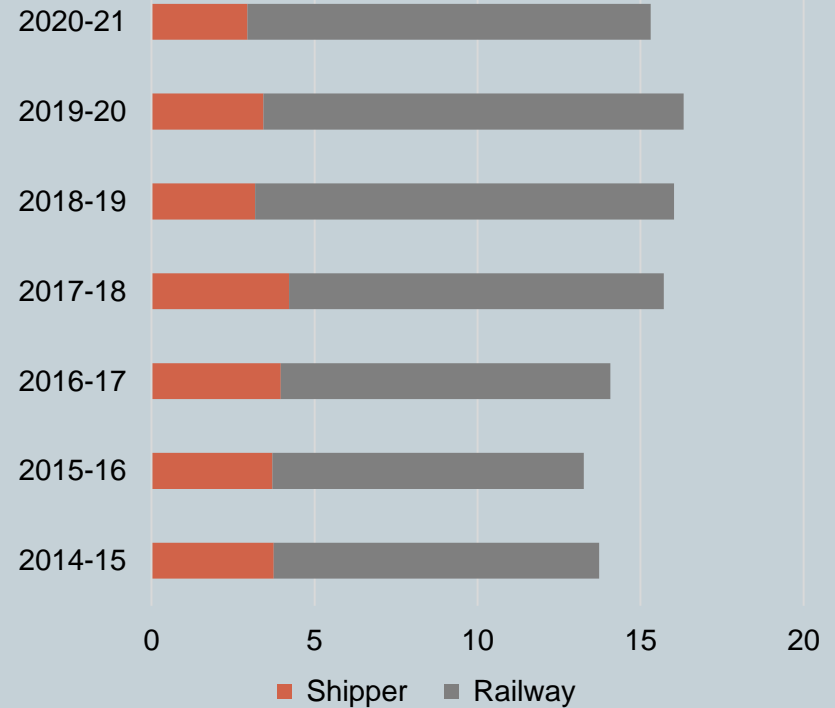
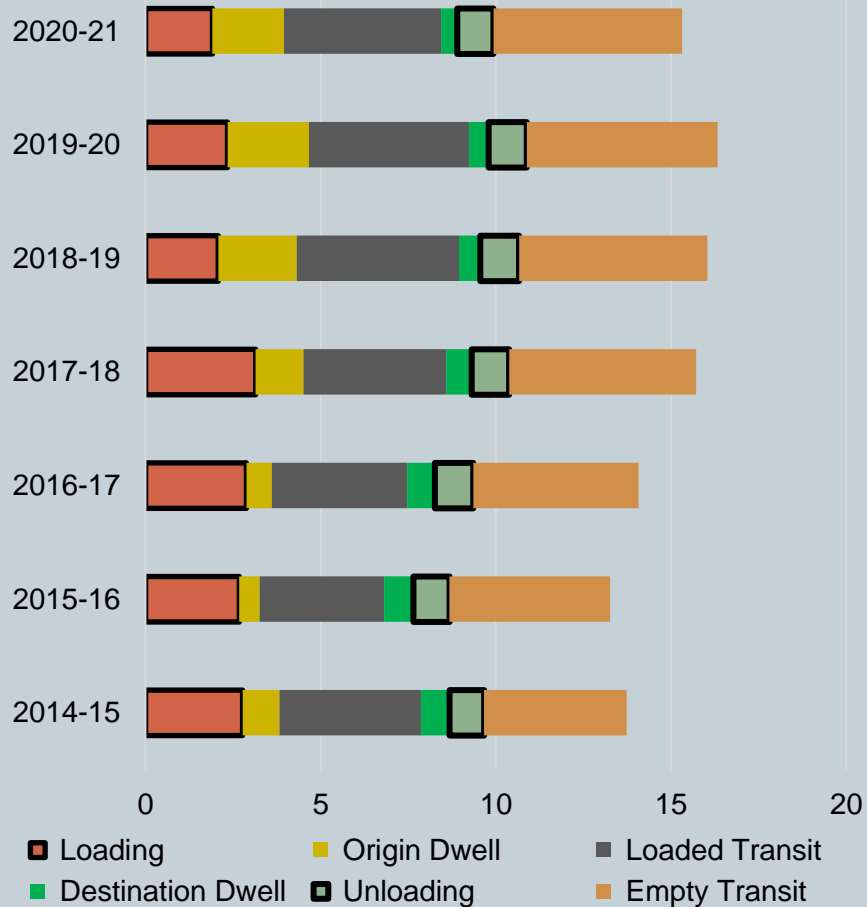
# Production and Supply: 2021 crop impact



	From LY	From 5 Yr Avg
<b>Production</b>	<b>-39%</b>	<b>-36%</b>
<b>Carry</b>	<b>-12%</b>	<b>-21%</b>
Cereals	-41%	-35%
Oilseeds	-34%	-28%
Special Crops	-29%	-39%



# Car Cycles – Components (Western Ports)



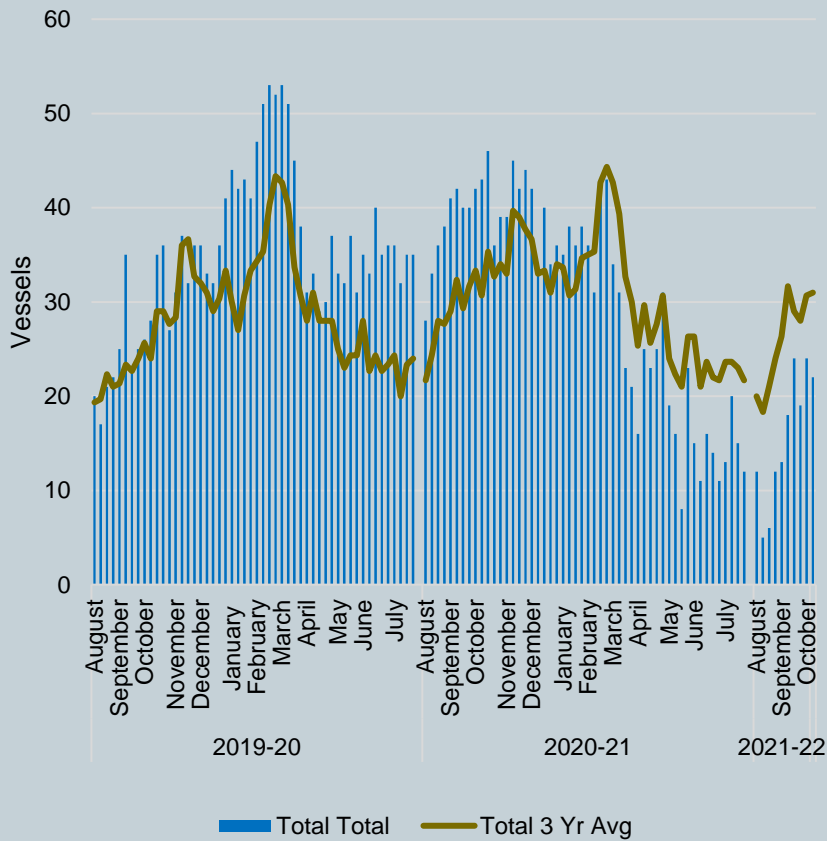
**Shipper time down 21%**  
**Railway time up 30%**



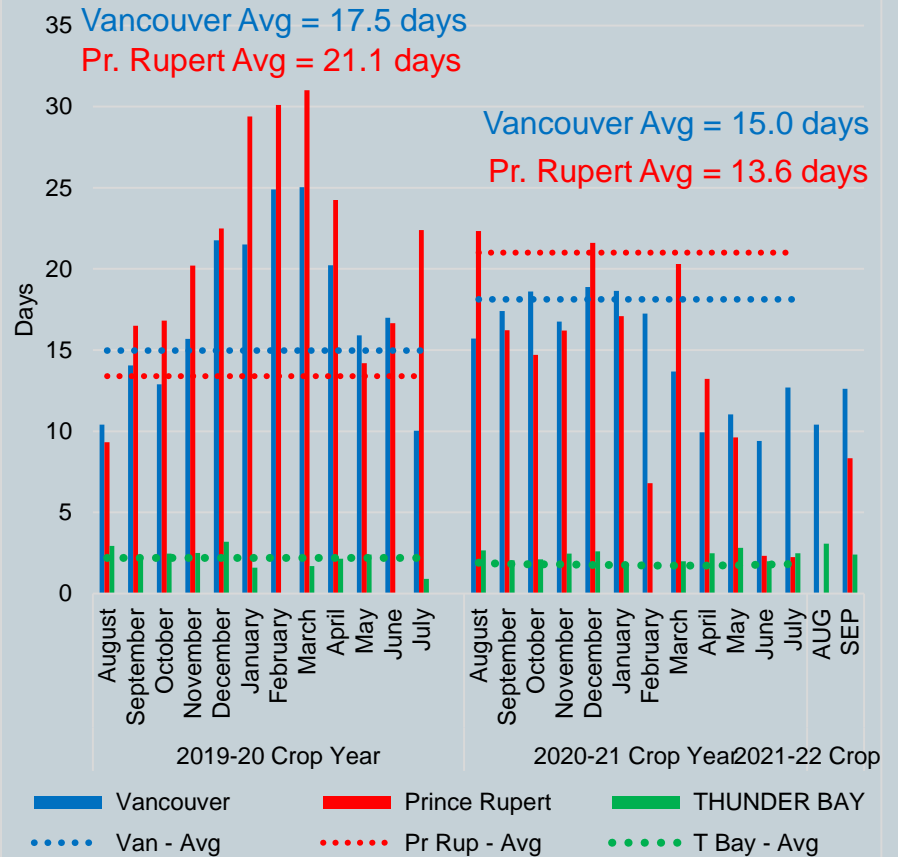


# Vessel Performance

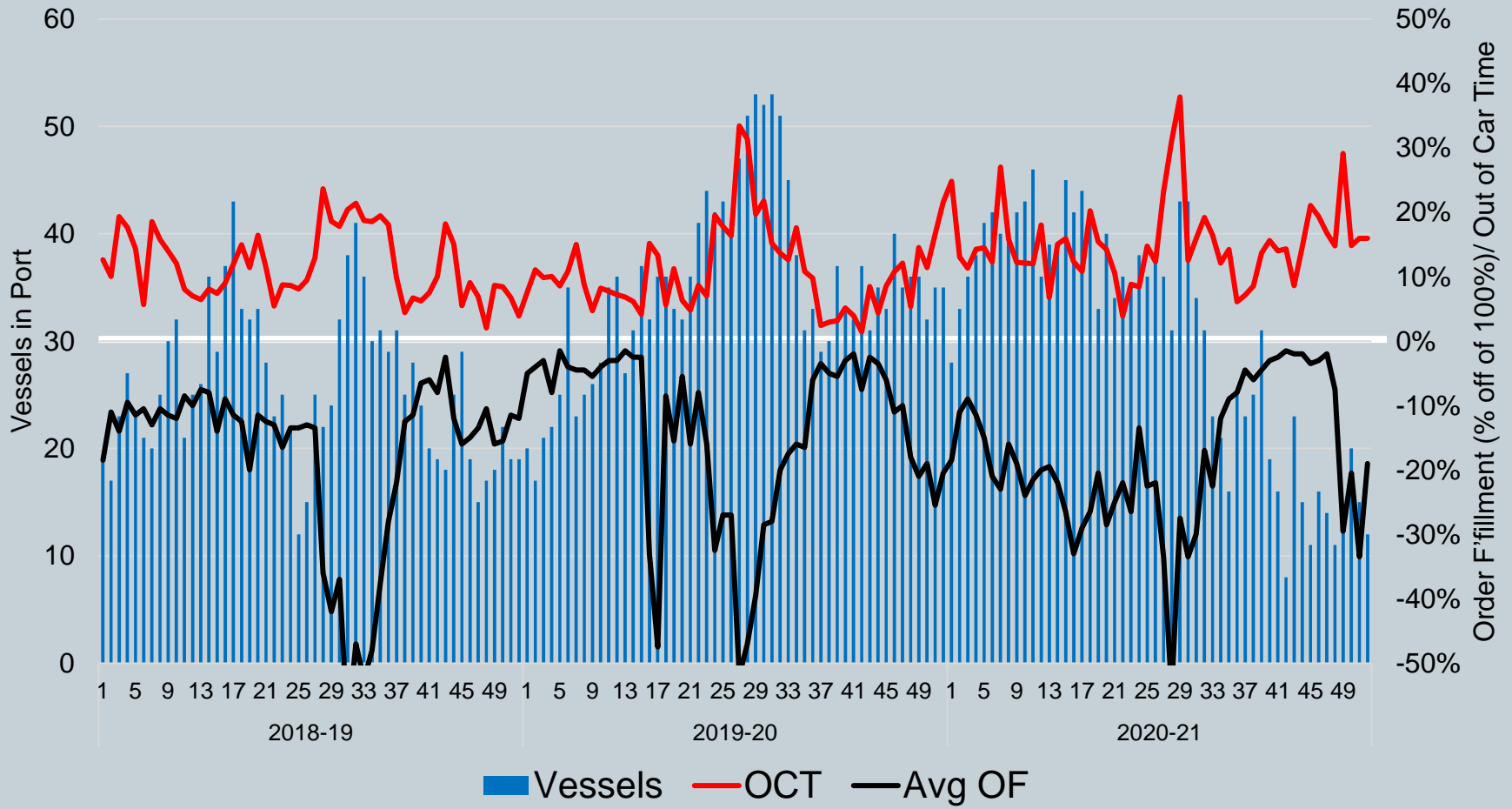
## Vessel Lineup (Vancouver and Prince Rupert)



## Average Days In Port Per Vessel

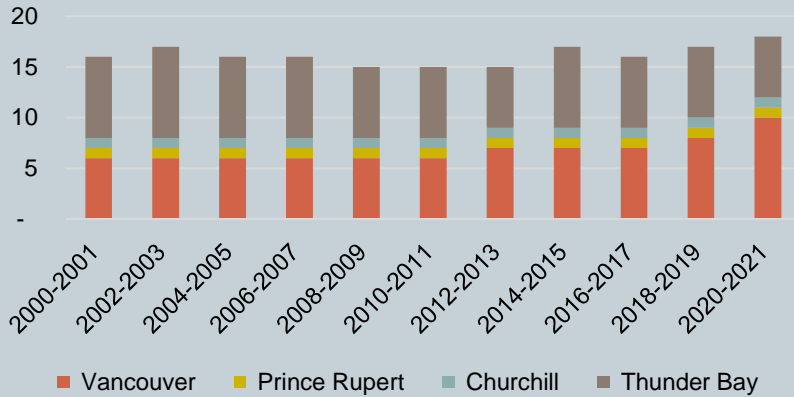


# Vessel Lineup vs. OCT vs. Order Fulfillment

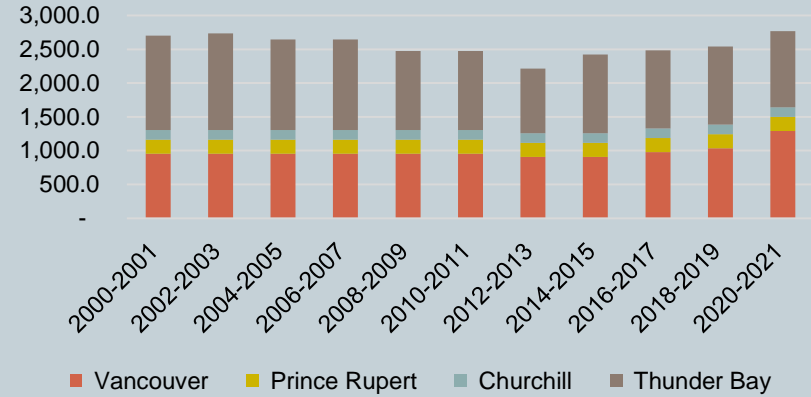


# Infrastructure

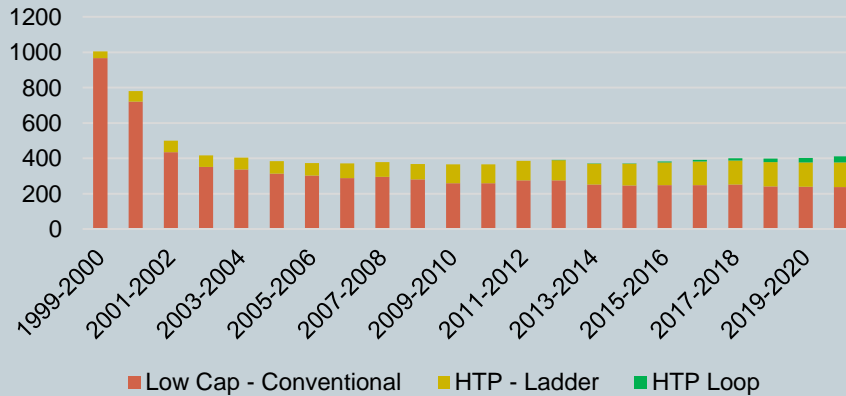
## Terminal Facilities



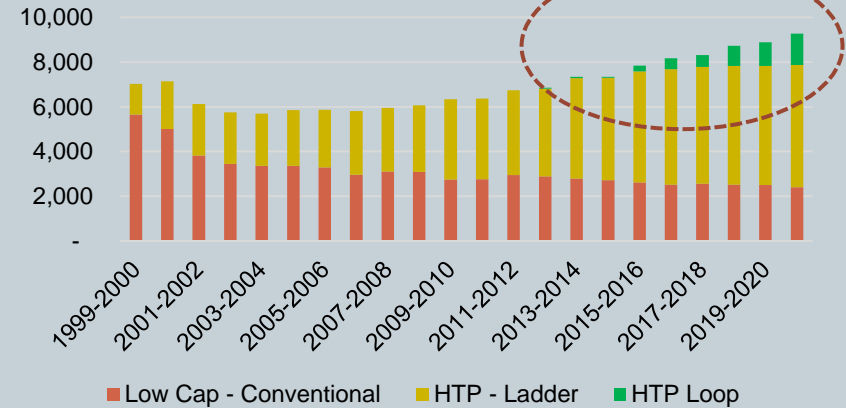
## Terminal Storage



## Country Facilities

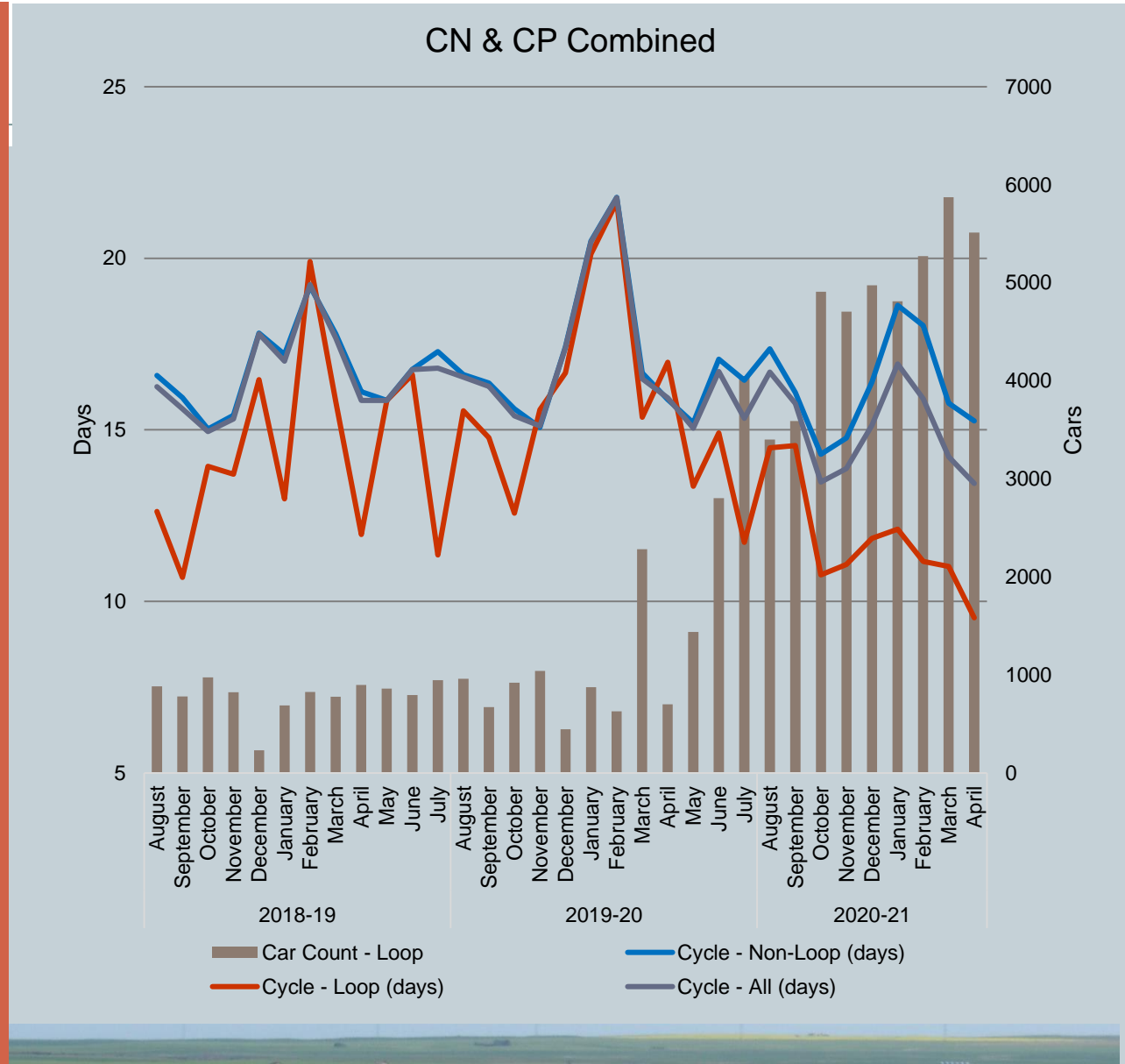


## Country Storage

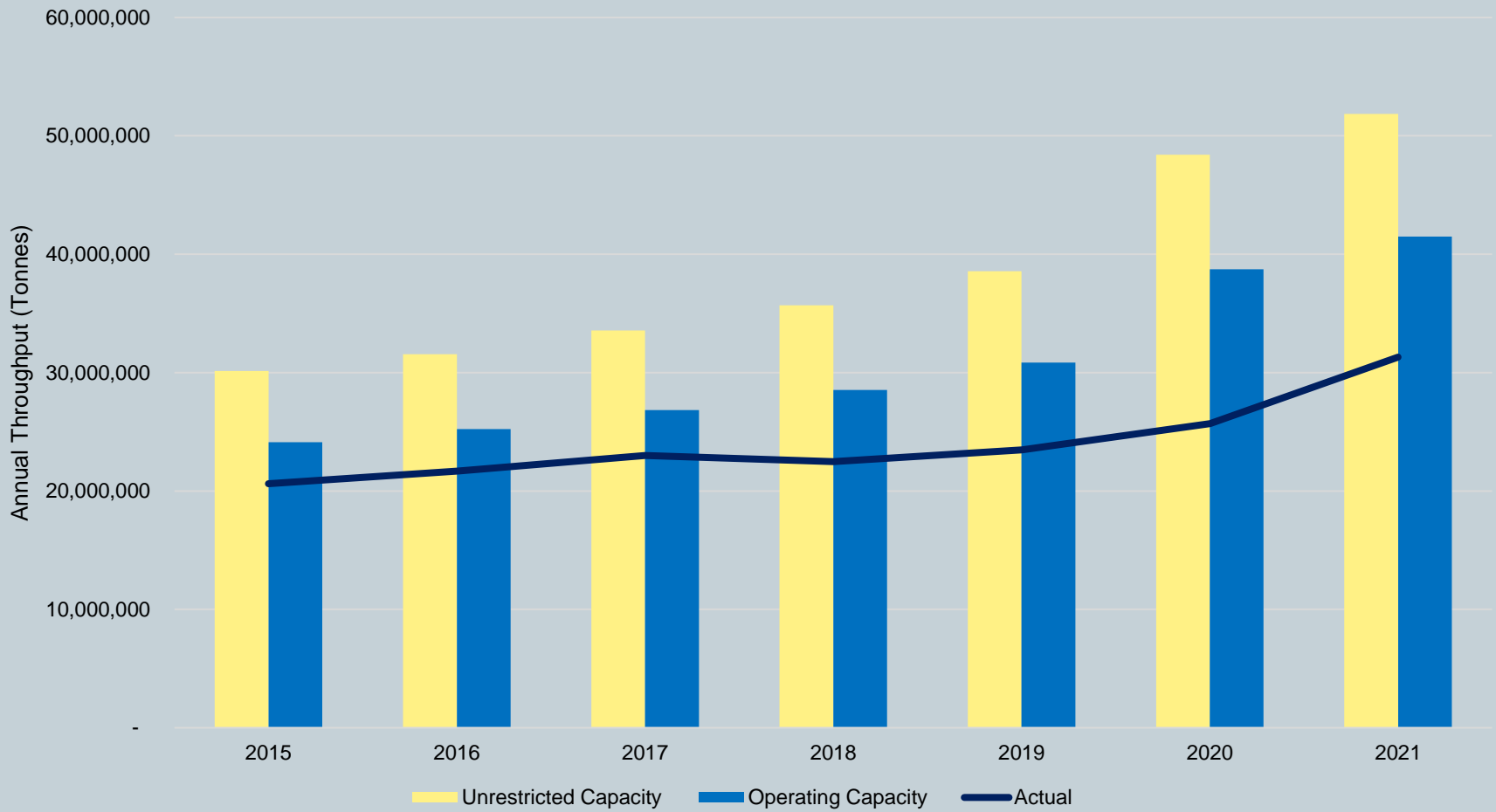


# Loop Track Car Cycle Vancouver Corridor

- Reveals structural difference between Loop-Track and Non-Loop-Track originations
  - Erratic values through early 2019-20 reflects lower and more irregular Loop-Track originations
- Shows “jumping-off” point in Q4 2019-20
  - Corresponds with opening of G3 Vancouver Terminal
  - Four-fold upturn in Loop-Track originations in just six months
- Average overall cycle reduced by Loop-Track sway



# Vancouver Terminal Throughput Capacity



# Challenges for the 2021-2022 Crop Year



- CN cutbacks are already showing reason for concern
  - Lower order fulfillment
  - Car cycle increasing
- Grain quality
  - Generally good (despite the drought)
  - Canola oil content is lower – requires greater segregations - requires more volume for crushers
- Expect staff/ shift cutbacks in the New Year account lower volumes



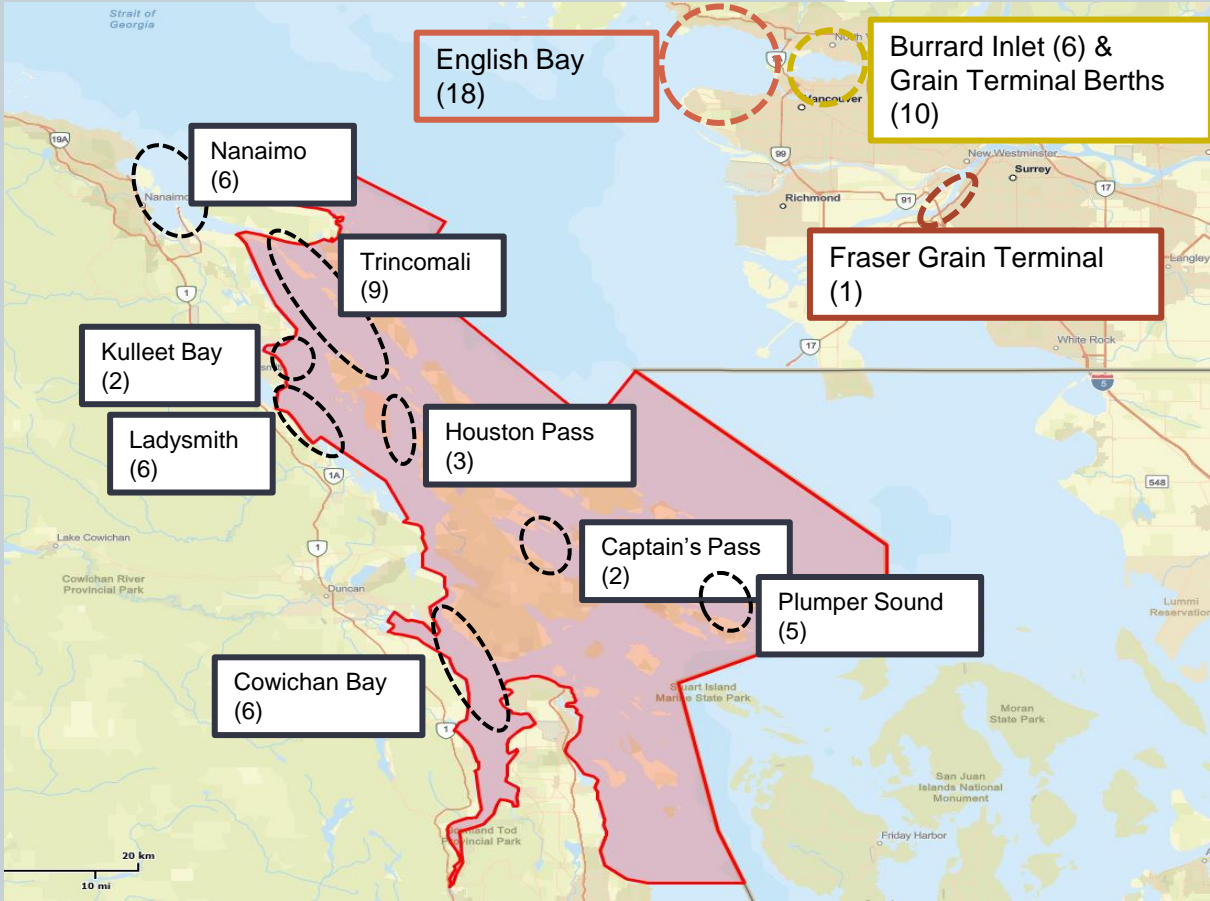


# West Coast Anchorage

- Grain Vessels regularly occupy 50%+ of all available anchors in English Bay. Trend was increasing until Q4 2020-21.
- Van. Island anchors used by grain when capacity in English Bay is taken.
- Private members bill C-250 to prohibit anchorage along the Southern Gulf Isles (died on the order paper)



# Port of Vancouver - Overview



## LEGEND

**English Bay**  
18 Anchorages

**Burrard Inlet**  
6 Anchorages  
10 Grain Terminal Berths

**Fraser Grain Terminal**  
1 Grain Terminal Berth

**Vancouver Island**  
39 Anchorages

**Bill C-250 Proposal**  
Affects 33 Anchorages



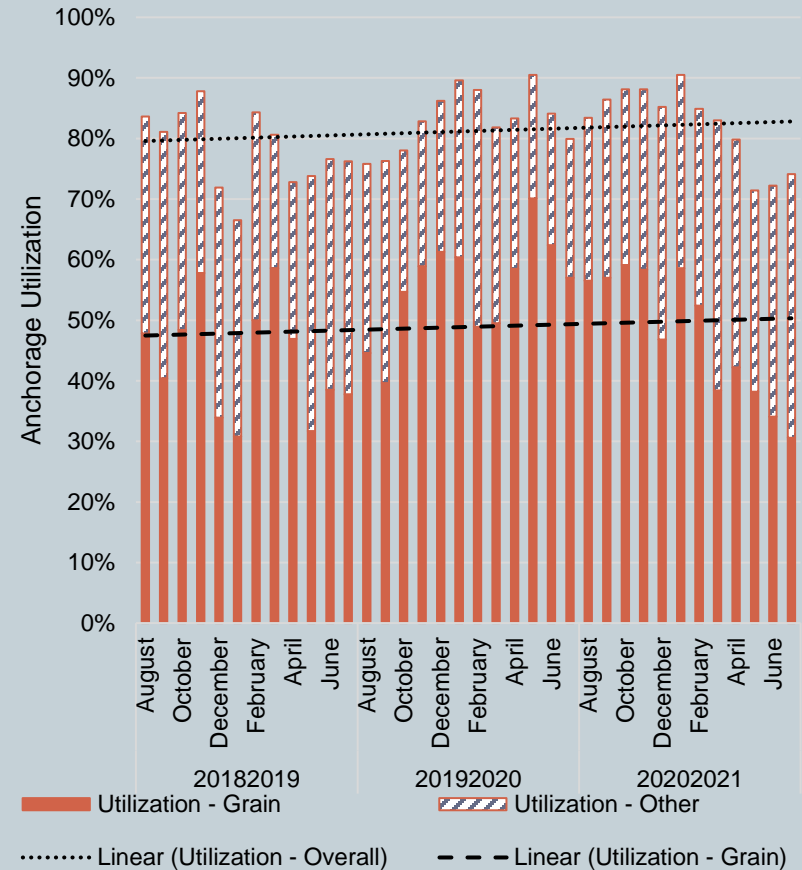
# English Bay

- Consistently high anchorage utilization with most months over 70% occupied.
- Due to proximity to terminals, grain vessels commonly take anchor in English Bay and typically account for half the utilization.
- Medium duration time at anchor of 4 – 5 days.

## Average Days at Anchor

Grain Year	All Vessels	Grain Vessels	Other Vessels
2018-19	4.56	4.69	3.81
2019-20	4.65	5.41	3.60
2020-21	4.19	4.45	3.89
2021-22 (YTD)	3.88	3.52	4.08

English Bay (18 anchors)



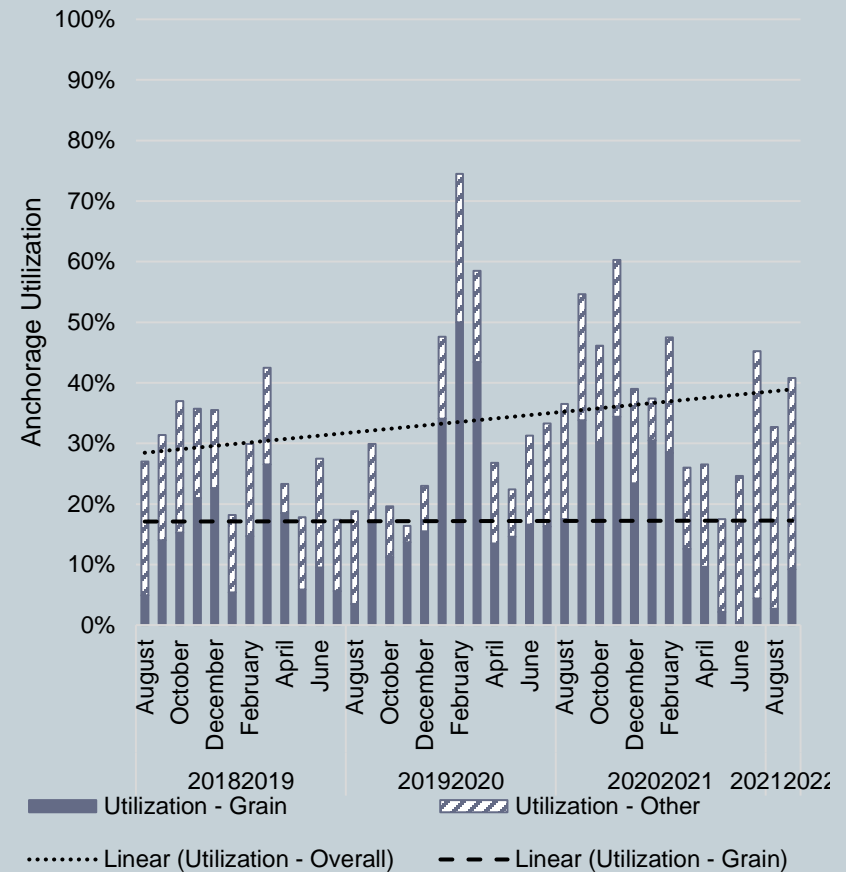
# Vancouver Island

- Anchorage use off the southern gulf islands is the subject of Bill C-250, a private member's bill to restrict vessels from taking anchor at 33 locations.
- Grain uses Island anchors primarily as overflow for English Bay and longer-term anchorage of a week or longer.
- Other commodity groups may prefer the Southern Gulf Islands for terminal access (e.g. coal at Roberts Bank).

## Average Days at Anchor

Grain Year	All Vessels	Grain Vessels	Other Vessels
2018-19	9.90	11.13	9.00
2019-20	10.31	12.27	8.21
2020-21	9.15	9.49	8.83
2021-22 (YTD)	12.39	8.10	13.57

## Vancouver Island (39 anchors)



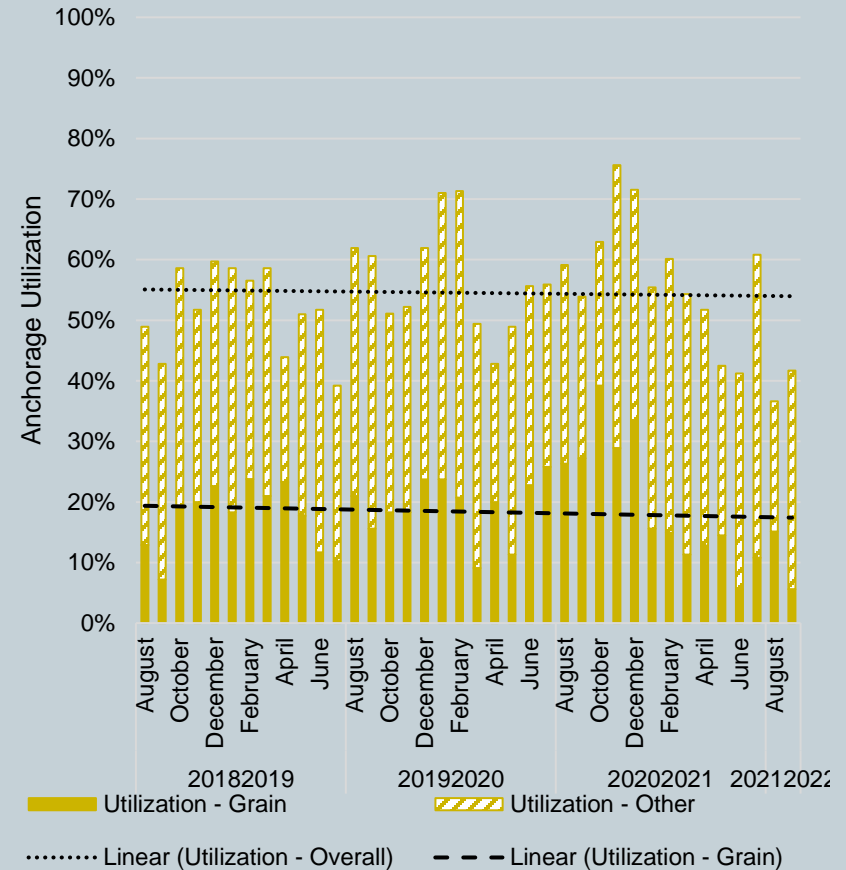
# Burrard Inlet

- Proximity to all grain terminals except Fraser Grain Terminal make these the preferred anchors for grain vessels.
- Inner harbour anchors are assigned for vessels ready to load or waiting for transit windows to depart. Consequently, vessels take anchor for short durations of 2 days or less, regardless of commodity group.

## Average Days at Anchor

Grain Year	All Vessels	Grain Vessels	Other Vessels
2018-19	1.89	2.03	1.82
2019-20	1.88	1.85	1.90
2020-21	2.01	1.80	2.15
2021-22 (YTD)	1.79	2.10	1.69

Burrard Inlet (6 anchors)



# Summary



- The GHTS has just had a record year in movement volumes, followed by low production (last seen in 2002), leading to an inevitable low movement this crop year.
- There are challenges that will be seen in the coming year:
  - Some capital projects to relieve congestion/ increase throughput capacity are slowly moving forward
  - Anchorage issue will continue to be a sore spot
  - It would be prudent to use this time to prepare for when volumes return to “normal” levels and those challenges do become critical





***Thank You***

***Reports Available***

***Website: [www.grainmonitor.ca](http://www.grainmonitor.ca)***



Quorum  
Corporation

12/1/2021