The Burden of Uncertainty: How North American Businesses are Shaping Their Response to Tariffs and What Trade Volatility Really Costs

New research from Purolator reveals how Canadian and U.S. businesses are shaping their response to tariffs—and what comes next

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Executive summary

Tariffs change. Trade policy shifts. But for the businesses moving goods across the Canada-U.S. border and internationally, the hardest thing to manage isn't the cost. It's the burden of not knowing what comes next.

In 2026, Purolator commissioned HelloInfo to survey 348 shipping and logistics decision-makers in Canada and the United States across industrial, retail, healthcare and technology supply chains. Beyond simply understanding how Canadian and American shippers are navigating an uncertain trade environment, we wanted to give businesses a proactive framework to move from exposure to action.

The quantitative survey was complemented by 41 in-depth interviews with logistics and procurement leaders across both countries, providing the qualitative depth to go beyond the numbers. Respondents were split equally between Canada and the U.S. and represented companies ranging from less than 500 to more than 5,000 employees.

In this research, we found that 91% of Canadian and U.S. businesses report concern about trade policy changes. Cost increases, supply chain disruptions and cross-border shipping complexity have all become central challenges for companies in both countries. Seventy-four percent say trade policy changes have had a moderate to significant impact on business planning. And on average, businesses report that tariffs have affected revenues by 23%, a number that remained consistent on both sides of the border.

But beneath the logistics and the obvious financial implications, the finding that stood out most was this: Respondents, unprompted, named tariff uncertainty as worse than the tariffs themselves. While tariffs are a modelled cost, uncertainty holds everyone back because it makes planning feel pointless for many leaders.

That finding shapes everything in this report.

91% of Canadian and U.S. businesses report concern about trade policy changes

Purolator commissioned this independent, deep-dive research, including 348 businesses and 41 in-depth interviews, to give our customers the clarity and data they need to navigate tariff uncertainty. We've done the heavy lifting so you don't have to face the 2026 CUSMA review alone.

Two countries, one crisis, different experiences

Canadian and U.S. businesses are both up against tariff uncertainty but they aren't fighting the same battle.

For Canadian businesses, U.S. tariffs on goods imported from Canada reduce the competitiveness of Canadian exports in the U.S. market, while Canada's dependence on the U.S. as its dominant trading partner makes diversifying away from that exposure easier said than done. U.S. companies, on the other hand, face a largely unidirectional burden: rising import costs without the same market dependency risk that makes the Canadian situation so acute.

53% of respondents have lost customers as a direct result of tariff impacts, but Canadian companies report higher customer loss rates than U.S. counterparts across all industries

The result is a measurable gap in outcomes. Over half of all respondents (53%) have lost customers as a direct result of tariff impacts, but Canadian companies report higher customer loss rates than U.S. counterparts across all industries. This is most notable in retail where 70% of Canadian companies have lost customers (vs. 41% of U.S. retailers) and healthcare where Canadian companies lead 67% to 44%. Pricing pressure, operational disruption and pessimism about what the upcoming CUSMA/USMCA review will deliver are also significantly higher north of the border.

For Canadian businesses struggling with reduced competitiveness in U.S. markets, here's how to protect profit margines:

1. **Map bidirectional exposure:** Conduct a complete audit of duty outlays for both inbound U.S. raw materials and outbound finished goods to the U.S. Use this data to identify which SKUs are most vulnerable to shifting retaliatory measures.
2. **Enforce mandatory CUSMA certification:** Make CUSMA/USMCA certificate collection a mandatory requirement for all inbound U.S. supplier shipments immediately to ensure you are not paying unnecessary duties on compliant goods.
3. **Use Purolator and Livingston International's joint expertise:** We'll analyze whether your current U.S. sourcing can be diversified or if "buy local" mandates are financially viable given the current tariff escalations.

Businesses are playing catch-up

The business community hasn't been passive in the face of uncertainty. Ninety-three percent of respondents have made operational changes in the past 18 months to mitigate tariff impacts and supply chain disruptions, such as shifting suppliers, rerouting shipments, investing in customs practices and often exiting markets or eliminating product lines entirely. Nearly half have raised prices and most expect to make further pricing changes in the next 18 months regardless of how trade policy evolves.

93% of respondents have made operational changes in the past 18 months to mitigate tariff impacts

But strategy is still catching up to reality. Pricing models remain unresolved. CUSMA/USMCA preparation is minimal for most companies, particularly mid-market businesses that have real exposure but limited internal infrastructure to navigate it. The pressure to prepare for the CUSMA/USMCA review is on and some businesses are more ready than others.

What shippers need and aren't always getting

Nearly 80% of respondents say they feel supported by their shipping providers but the qualitative picture is more complicated. During peak tariff volatility, many cross-border shipping partners were described as companions in confusion rather than guides. They were slow to communicate, inconsistent in their guidance and reactive when businesses needed proactive counsel most.

What companies want from cross-border shipping partners is clear:

- Proactive analysis of their tariff exposure
- Practical operational guidance
- Clarity on CUSMA/USMCA review implications
- A single point of contact when things go wrong

The providers that deliver on these mission-critical needs will earn loyalty that outlasts this tariff cycle.

As one of Canada's largest courier and freight networks, and a cross-border specialist, Purolator has been embedded in these conversations across every industry. We completed this deep dive into the impact of tariffs to help you get ahead of what's to come. The sections that follow are designed to do exactly that.

Learn how to improve cross-border efficiency

How to use this report

This research was conducted to give Canadian and U.S. businesses concrete steps to navigate an environment defined by uncertainty. The sections that follow unpack each of these themes in depth with insights by country, industry and company size, and close with a practical framework for the actions that matter most over the next 12 months.

The situation is complex, but the path forward is clearer than it might feel right now.

* This research was commissioned (paid for) by Purolator and conducted by HelloInfo, an independent research firm. Purolator was not identified as the sponsor during data collection.

The current state of North American trade

For decades, the Canada-U.S. trading relationship functioned as one of the most stable and deeply integrated economic partnerships in the world. Cross-border supply chains were built on the assumption that goods would move, rules would hold and the cost of doing business across the border would remain manageable.

Many industries likely organized themselves around that assumption. Supplier relationships, distribution networks, pricing models and growth strategies were all constructed on the foundation of a trading relationship that, whatever its occasional tensions, could be counted on, but that assumption no longer holds true.

About this research

Rather than a collection of data, this study is a strategic investment Purolator has made on behalf of our clients. We wanted to look beyond the headlines to provide a concrete roadmap for what comes next, so that no North American business has to navigate this burden of uncertainty alone.

To understand how businesses on both sides of the border are experiencing and responding to this new reality, Purolator commissioned HelloInfo to conduct an independent, comprehensive study of 348 supply chain and logistics decision-makers across the United States and Canada in early 2026. Respondents were drawn equally from both countries and represented four industries (industrial, retail, healthcare and technology) with company sizes ranging from less than 500 employees to more than 5,000. The quantitative survey was complemented by 41 in-depth interviews with logistics and procurement leaders to provide the qualitative depth needed to understand the human reality behind the data.

The result is one of the most detailed pictures available of how North American businesses are experiencing, responding to and preparing for an era of sustained trade uncertainty.

How we got here: a brief history of the current Canada-U.S. trade and tariff uncertainty

The current global trade environment didn't occur overnight. It began as a series of targeted tariff measures and escalated quickly into one of the most disruptive periods in North American trade history.

Period	What happened
February 2025	Trump administration imposes 25% tariffs on Canadian and Mexican goods, citing national security concerns.
February 2025	Canada responds with retaliatory tariffs on approximately $30 billion CAD in U.S. goods.
March–April 2025	Tariff escalation continues across steel, aluminum and automotive sectors. As a result, Canadian exports to the U.S. fall drastically.
August 2025	U.S. eliminates de minimis exemption for low-value shipments, hitting retail and e-commerce particularly hard.
February 2026	The U.S. Supreme Court strikes down global tariff authority under IEEPA and the U.S. imposes replacement of 10% global tariffs under Section 122 of the Trade Act of 1974.
February 2026	CUSMA/USMCA-compliant goods remain exempt from Section 122 tariffs, reinforcing the value of certification.
July 2026	Mandatory CUSMA/USMCA joint review will occur, when all three governments must decide whether to extend the agreement for another 16 years.

What the research found: tariff uncertainty tops cross-border shipping concerns

The scale of concern across the business community is striking: 91% percent of respondents report some level of concern about global trade policy changes, with 32% describing themselves as very concerned and 35% as concerned. Only a small minority, primarily in healthcare where tariff exemptions often offer protection, report no concern at all.

91%

of companies across industries report some concern about trade policy changes

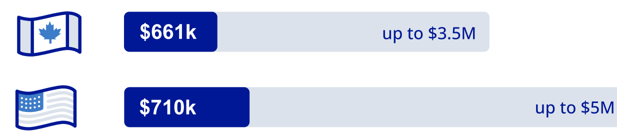
That concern is translating directly into disruption: 74% of respondents say trade policy changes have had a moderate to significant impact on business planning. When the rules governing business decisions could shift with limited notice, companies are struggling to predict costs, set prices, negotiate supplier contracts and commit to capital investments.

Find out how tariffs are reshaping cross-border business

The financial impact is substantial and consistent across borders. On average, businesses report that tariffs have affected revenues by approximately 23 cents on the dollar (22.6% for Canadian companies and 22.9% for U.S. companies). Among Canadian respondents who quantified the impact in dollar terms, companies lost an average of $661,000, with some businesses absorbing losses as high as $3.5 million. For U.S. respondents, the average was $710,000, with impacts reaching as high as $5 million.

Financial impact of tariffs

Annual impact per company



Tariff-related costs have now become the single most pressing cross-border shipping and trade concern for businesses in both countries, ranked number one by 45% of all respondents. That's more than three times the rate of the next closest concern (overall shipping cost increases at 13%).

But the most important finding in this research isn't a financial one. In 41 in-depth interviews, logistics and supply chain leaders across industries repeatedly said that unpredictability is worse than the tariffs themselves.

A tariff is a cost. It can be modelled, absorbed, passed through or built into a contract. Uncertainty is different. It paralyzes planning, delays investment and forces businesses into reactivity. Rather than preparing for what comes next, they must focus on responding to what just happened. Multiple respondents said they've reached a point where long-term planning felt not just difficult, but pointless.

> "I expect disruption every single day. I don't think we can plan ahead—it's almost gotten to the point where it wouldn't really help us."
>
> *— U.S. retail company*

This is the defining challenge of the current trade environment. But with the right safeguards, partners and forward-thinking strategies, businesses in Canada and the U.S. can plan for what's to come.

Two countries, two different battles

Canadian and U.S. businesses are both navigating the same tariff environment but they're not fighting the same battle. The nature of the pressure, scale of the disruption and options available to respond differ significantly depending on which side of the border a business calls home. Knowing those differences is essential to understanding what this research found.

The Canadian challenge: dependency on the U.S. trading relationship

For Canadian businesses, the tariff environment has created a dual burden with no easy exit. U.S. tariffs on Canadian exports have reduced the competitiveness of goods crossing southbound, while retaliatory tariffs on specific U.S. imports have simultaneously increased the cost of goods moving northbound. For companies that both sell into the U.S. market and source from U.S. suppliers (which describes a significant portion of Canadian industrial, retail and manufacturing companies), the pressure is often coming from both directions at once.

That reality is compounded by geography and dependency. The U.S. is Canada's largest trading partner, so for most Canadian businesses, diversifying away from U.S. market exposure is complex. The companies attempting it are doing so at significant cost and with significant uncertainty about whether new markets will support their needs.

The U.S. challenge: broader but more unidirectional

U.S. businesses face a different but still significant challenge. The instinct to "buy domestic" as a tariff mitigation strategy has proven less effective than many anticipated because domestic suppliers are frequently importing tariff-exposed raw materials themselves. A U.S. manufacturer sourcing steel, electronics components or pharmaceutical ingredients from domestic suppliers is still, in many cases, absorbing the cost of upstream tariffs, just one step removed.

The result is a business environment where tariff costs are diffuse and difficult to trace, making them harder to model and address than a straightforward duty on a specific imported good.

The gap in outcomes

The differing pressures on each side of the border have produced measurably different outcomes and the data makes that gap visible.

Customer loss is a persistent concern across both countries: 17 respondents ranked it their number one trade-related worry and 24 ranked it second. Canadian and U.S. companies are equally likely to rank it among their top two concerns, though U.S. industrial companies and Canadian retail companies show the strongest signals of impact. Given the sample sizes involved, these are directional indicators rather than statistically definitive findings but they point to where the pain is concentrated.

Canadian retail companies are **1.7x more** likely to report customer losses than U.S. counterparts.

More than half of all respondents (53%) have lost customers as a direct result of tariff impacts (61% of Canadian companies vs. 44% of U.S. peers). In the U.S., customer loss is relatively consistent across industries, with no single sector standing out significantly. In Canada, it's more concentrated in retail and healthcare: 70% of retail companies and 67% of healthcare companies have lost customers (vs. 41% of U.S. retailers and 44% of U.S. healthcare companies).

> Out of our top 10 customers, we lost two of them that decided to go to another supply chain that will guarantee no fluctuations or uncertainty."
>
> — *U.S. technology company*

Pricing pressure tells a similar story. Canadian companies are statistically more likely to have raised prices than their U.S. counterparts, which reflects the compounding effect of costs rising on both sides of their supply chains at the same time. And sentiment about what comes next diverges sharply: 69% of U.S. respondents are optimistic about the outcome of July's CUSMA/USMCA review, compared to just 55% of Canadian respondents. This gap shows a grounded understanding of who has more to lose if the review delivers an unfavorable result.

> "We have to think that in these types of fights, usually the most powerful party wins. The U.S. is the strong party in this fight. They're probably going to have the advantages"
>
> — *Canadian healthcare company*

Why each industry is feeling the impact of tariffs differently

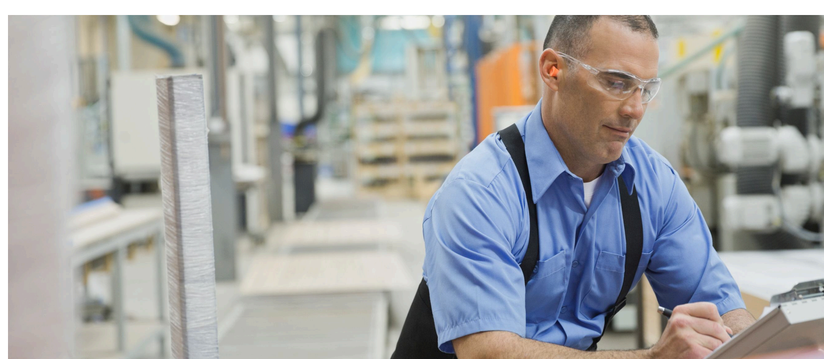
The tariff environment hasn't hit all sectors equally. The nature of a company's goods, its sourcing geography and its reliance on cross-border shipping all shape how exposed it is and how many tools it has available to respond.

Industrial has been hit the hardest

80%+

of industrial respondents have felt an impact to business planning as a result of tariffs

Industrial companies are feeling the impact of tariffs more than other sectors. Few industrial goods benefit from broad tariff exemptions, leaving companies to absorb costs, pass them through or restructure their supply chains entirely. Canadian industrial companies face the additional burden of retaliatory tariffs on U.S. imports, making theirs the most acute cross-border shipping exposure in the dataset.



Learn how to navigate cross-border trade tariffs

How Purolator and Livingston International support industrial companies:

Moving manufacturing is a massive undertaking. Livingston's experts provide the initial tariff fee analysis and CUSMA/USMCA certification strategy to ensure the move is financially viable, while Purolator's integrated freight network manages the complex logistics of shifting your supply chain to new regions like Mexico.

Partner with us

How Purolator and Livingston International support retailers:

Purolator and Livingston International help retailers build e-commerce strategies that no longer rely on expired duty-free thresholds. While Livingston identifies the correct HTS classifications to minimize duties, Purolator offers shipping consolidation and U.S.-based fulfillment options to reduce border crossing frequency and improve your transit times.

Partner with us

Dive deeper into industrial's response to tariffs

Dive deeper into retail's response to tariffs

Retail mostly affected by de minimis exemption exemption changes

Canadian retail companies are 1.7 times more likely to report customer losses than U.S. counterparts (70% vs. 41%)

Retail companies are also absorbing broad tariff exposure alongside the suspension of the de minimis exemption, which previously allowed low-value shipments under $800 to enter the U.S. duty free. The elimination of that threshold has hit retail—particularly e-commerce and cross-border retail volumes—harder than any other industry. CUSMA/USMCA certification rates in retail are also the lowest of any sector, since most retail sourcing comes from APAC, meaning the protections available to other industries are largely out of reach for retail companies.

Find out what de minimis changes mean for your business

Healthcare has been largely insulated by tariff-exempt HTS codes

Only 50% of healthcare companies are concerned about tariff changes, the lowest of any sector

Healthcare is the outlier in this dataset. Healthcare goods are frequently classified under HTS codes that are broadly exempt from duties under CUSMA/USMCA or shipped at values above the thresholds that trigger the most disruptive tariff measures. This has in part insulated the sector from the immediate financial shock that's hitting other industries. However, this protection is a result of classification, not complete immunity. Any renegotiation of CUSMA/USMCA that changes exempt categories could shift the situation quickly.

U.S. healthcare companies report lower concern levels than industrial and retail peers, and domestic-heavy supply chains have provided some insulation from the tariff pressure hitting other sectors. But healthcare sourcing extends well beyond North America, making those protections irrelevant for many goods. Likewise, the pharmaceutical sector also now faces a Section 232 investigation into pharmaceutical imports, with potential tariffs of up to 100% on patented pharmaceuticals and active pharmaceutical ingredients. For healthcare companies with significant pharmaceutical supply chains outside North America, the period ahead may look very different from the relative stability of the past 18 months.

How Purolator and Livingston International support healthcare companies:

In healthcare, certainty comes from both data and communication. Livingston stress-tests your current HTS codes to ensure your exempt status remains secure during the 2026 review, while Purolator provides a proactive, single point of contact that ensures you're never left in the dark during periods of trade volatility.

Partner with us

Dive deeper into healthcare's response to tariffs

Technology struggling most with compliance and paperwork

U.S. technology companies are 1.5 times more likely than Canadian peers to invest in strategic customs practices in the next 18 months

For technology companies, there's a structural challenge that sets them apart from other industries: Most manufacturing is concentrated in Asia, leaving them with limited ability to quickly restructure supply chains in response to tariffs. The primary burden for tech comes from compliance and paperwork complexity. Companies must revisit commercial invoicing structures, manage HTS code accuracy and navigate rules of origin documentation rather than the direct duty outlays that are hitting industrial and retail companies. The exposure is real, but the lever to pull is the hardest and most costly of any sector to execute.

How Purolator and Livingston International support technology companies:

Technology firms are managing the tariff burden through compliance, not just structural change. Through the Purolator Trade Assistant and Livingston's trade experts, we provide the deep consulting you need on rules-of-origin documentation and HTS reclassification, backed by a courier network that delivers to 100% of Canadian postal codes.

Partner with us

Dive deeper into technology's response to tariffs

Impact of tariffs by industry

Heathcare

Domestic-heavy supply chains have provided some insulation from the tariff pressure hitting other sectors. But for goods sourced outside of North America, those protections are irrelevant.

Industrial

Most exposed overall. Few exemptions available, costs rising on both sides of the supply chain for Canadian companies and the most aggressive restructuring underway of any sector.

Retail

Most exposed to de minimis changes. The suspension of the $800 duty-free threshold has hit cross-border e-commerce volumes harder than any other industry and low CUSMA/USMCA certification rates leave retail companies with fewer tools to respond.

Technology

Exposed but constrained. Manufacturing is concentrated abroad with limited ability to nearshore quickly, meaning tech companies are managing the tariff burden through compliance investment rather than structural change

The pressure for both countries is real, the stakes are high and the clock is running, but businesses on both sides of the border are responding. The next section examines what separates the companies navigating tariff uncertainty well from those that are still catching up.

How Canadian and U.S. businesses are responding to tariff uncertainty

The North American business community hasn't been passive in the face of tariff disruption. Across industries and geographies, companies have restructured to avoid supply chain disruptions, exited markets, renegotiated contracts and absorbed costs, often all at once. But the scale and speed of that response to tariffs varies significantly by country, industry and company size. For many businesses, strategy is still catching up to a reality that has been moving faster than any planning cycle anticipated.

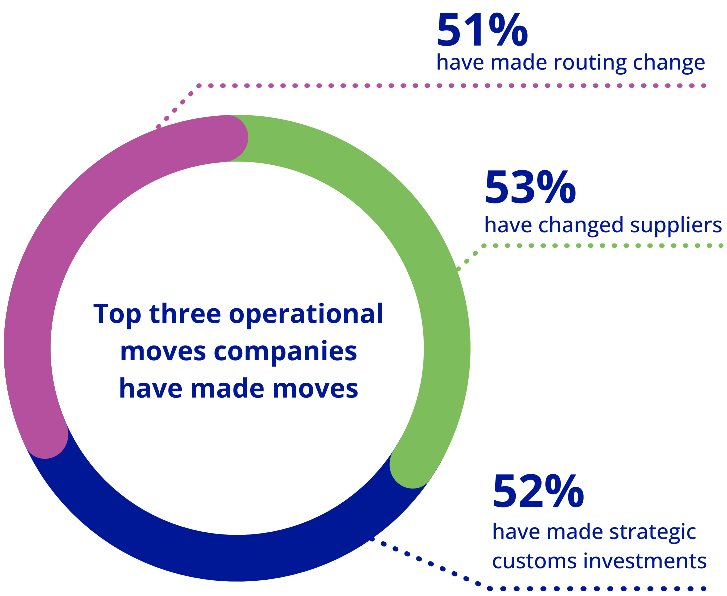
Read how cross-border shippers are mitigating tariff impact

What businesses have already done

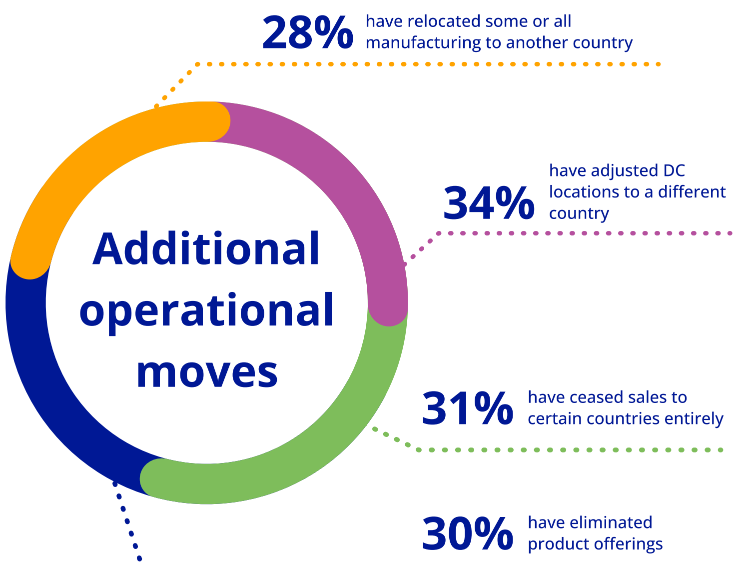
93% of respondents have made at least one operational change in the past 18 months

Ninety-three percent of respondents have made at least one operational change in the past 18 months as a direct result of tariff changes. The most common moves reflect a clear priority: reduce exposure, optimize costs and build flexibility into supply chains that were designed for a more stable environment.

Supplier diversification leads the list, with 53% of respondents having changed suppliers to those in countries with lower tariff rates. Strategic customs investment follows at 52%, including investments in free trade agreements, tariff engineering and HTS code reclassification. Approximately half (51%) have made routing changes, reflecting a widespread shift in how goods move across borders rather than just where they come from.

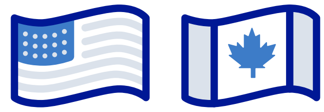


Beyond those top three, the picture becomes more structural: 34% have adjusted distribution centre (DC) locations to a different country, 31% have ceased sales to certain countries entirely and 30% have eliminated product offerings. Twenty-eight percent have relocated some or all manufacturing to another country, a significant operational undertaking that signals not just short-term adaptation but a longer-term strategy to mitigate supply chain disruptions.



[Discover tariff relief and global market opportunities]

Meanwhile, 7% report making none of the listed operational changes. However, this is mostly among smaller organizations that either lack the capital or infrastructure to respond, or are uncertain whether the current tariff environment will hold and see little point in committing to structural changes that could change at any moment.



Where the response to tariffs diverge: Canada vs. U.S.

The nature of the operational response to tariffs differs meaningfully by country. Sixty-eight percent of Canadian respondents have adjusted their shipping to and from the U.S. as a result of tariff and de minimis exemption changes. This rate is notably lower among U.S. companies for whom the changes are less directly disruptive to cross-border flow.

Among Canadian companies that have adjusted their U.S. shipping:

55% are decreasing the use of U.S.-based suppliers

47% are passing through additional fees to U.S.-based suppliers

43% are moving warehouse or processing facilities to Canada.

The "buy local" sentiment has evolved from an informal preference to an explicit operational mandate in some Canadian companies. This shift deprioritizes U.S.-based partnerships in favor of domestic ones, driven as much by the political environment as by tariff economics.

U.S. industrial companies, meanwhile, are more likely to be absorbing costs and investing in strategic customs practices than making structural market exits, which suggests a different analysis about where the risk lies and what the available levers are.

Mexico is filling the gap for many cross-border shippers

Mexico is emerging as a strategic buffer for companies on both sides of the border. As a CUSMA/USMCA-compliant manufacturing and distribution location, Mexico allows companies to reduce direct U.S.-Canada border exposure while remaining within the trade agreement's protections. In the past 18 months, 19 organizations have moved DC operations to Mexico and 23 have moved some manufacturing there.

Canadian companies are driving that trend disproportionately, accounting for 12 of the 19 DC moves and 12 of the 23 manufacturing moves, a clear signal that Canadian businesses are taking more aggressive action than their U.S. counterparts in response to tariffs.

These are still relatively modest numbers and the Mexico trend is more of a directional signal than a mass migration. But the direction is consistent and accelerating: 22 organizations plan to move DC operations to Mexico in the next 18 months and 24 plan to move manufacturing, suggesting the trend will continue regardless of how the CUSMA/USMCA review plays out.

Explore how nearshoring to Mexico can help mitigate tariff impact

Industrial moves to Mexico

Distribution Centres & Manufacturing

	In the past 18 months	In the next 18 months
DC operations	**19** moved DC operations	**22** plan to move DC operations
Manufacturing	**23** moved manufacturing	**24** plan to move manufacturing

Explore how nearshoring to Mexico can help mitigate tariff impact

Pricing strategies: unresolved and under pressure

On the pricing front, the picture is one of widespread adaptation and persistent uncertainty. Nearly half (49%) of respondents have raised the price of their end products, while 43% have reviewed their supply chain strategy for cost-cutting opportunities. Additionally, 42% have decreased profit margins on products, absorbing costs rather than passing them through. Another 39% have been forced into internal cost cutting.

Pricing adjustment strategies in the past 18 months

49% have raised the price of their end products

43% have reviewed their supply chain strategy for cost-cutting opportunities

42% have decreased profit margins on products

39% have been forced into internal cost cutting

Three broad pricing models have emerged across the business community: complete pass-through of tariff costs to end customers, partial pass-through combined with margin compression and full absorption where competitive pressure or fixed contracts leave no room for price increases. Most businesses are operating somewhere in the middle, selectively passing through costs on specific SKUs or customer segments while absorbing others, and scheduling price increases for later in the year rather than applying them immediately.

Pricing adjustment strategies in the next 18 months

86% expect their organizations to make pricing changes

50% plan to increase selling prices

50% plan to conduct further supply chain reviews for cost cutting

This leaves little room for optimism about price stability. Eighty-six percent of respondents expect their organizations to make pricing changes in the next 18 months as a result of tariff changes, 50% plan to increase selling prices and 50% plan to conduct further supply chain reviews for cost cutting. That view holds regardless of how tariff policy itself evolves, suggesting that the pricing impact of tariffs of the past 18 months have become embedded in ongoing operations rather than temporary.

Industry variations: how each sector is responding

The operational response to tariffs looks different across sectors, shaped by each industry's tariff exposure, sourcing geography and available options.

Industrial is making the most aggressive moves of any sector

Industrial companies are most likely to have relocated manufacturing, ceased sales to certain countries and eliminated product offerings entirely. Canadian industrial companies face compounding pressure from both sides of their supply chain and are more likely than their U.S. industrial peers to plan product eliminations in the next 18 months. U.S. industrial companies, by contrast, are more likely to invest in strategic customs practices (56% vs. 40% of Canadian industrial companies).

Retail is feeling the largest financial burden

The suspension of the de minimis exemption has devastated cross-border e-commerce volumes in ways that other sectors haven't experienced. One respondent confirmed that they're shutting down U.S. shipping entirely. Another is absorbing hundreds of millions in new costs. Canadian retail companies are weighing fulfillment and warehouse investments in the U.S. to reduce border crossing frequency, but tariff uncertainty is making those capital decisions nearly impossible to commit to.

Healthcare reports lowest concern and fewest operation changes

This is largely due to tariff-exempt HTS code classifications, shipment values that fall above threshold triggers and domestic-heavy supply chains. However, those protections do not apply to goods sourced from outside North America and any CUSMA/USMCA review outcome that touches exempt categories would change the picture quickly.

Technology lacks the flexibility to make proactive change

As mentioned, most technology manufacturing is concentrated in Asia, giving tech companies limited ability to nearshore or reshore quickly. The primary burden for tech has been compliance complexity (such as revisiting commercial invoicing structures, managing rules of origin documentation and navigating HTS reclassification) rather than the direct duty outlays that have hit industrial and retail. Technology companies in the U.S. are 1.5 times more likely than their Canadian peers to invest in strategic customs practices in the next 18 months, reflecting a growing recognition that proactive compliance infrastructure is becoming a competitive differentiator.

Beyond Mexico, a China +1 sourcing strategy is an emerging trend for technology supply chains. Rather than consolidating manufacturing in a single offshore location, technology companies are diversifying into alternative markets, with Vietnam increasingly cited as a primary destination. Purolator is already working with technology customers to redesign supply chain solutions from Vietnam into Canada, a trend that reflects both tariff mitigation strategy and a longer-term effort to reduce single-country manufacturing dependency.

What businesses are planning next

Businesses are adapting but it's not a one-time adjustment. It's an ongoing reconfiguration of cross-border shipping that will continue regardless of what July's CUSMA/USMCA review brings.

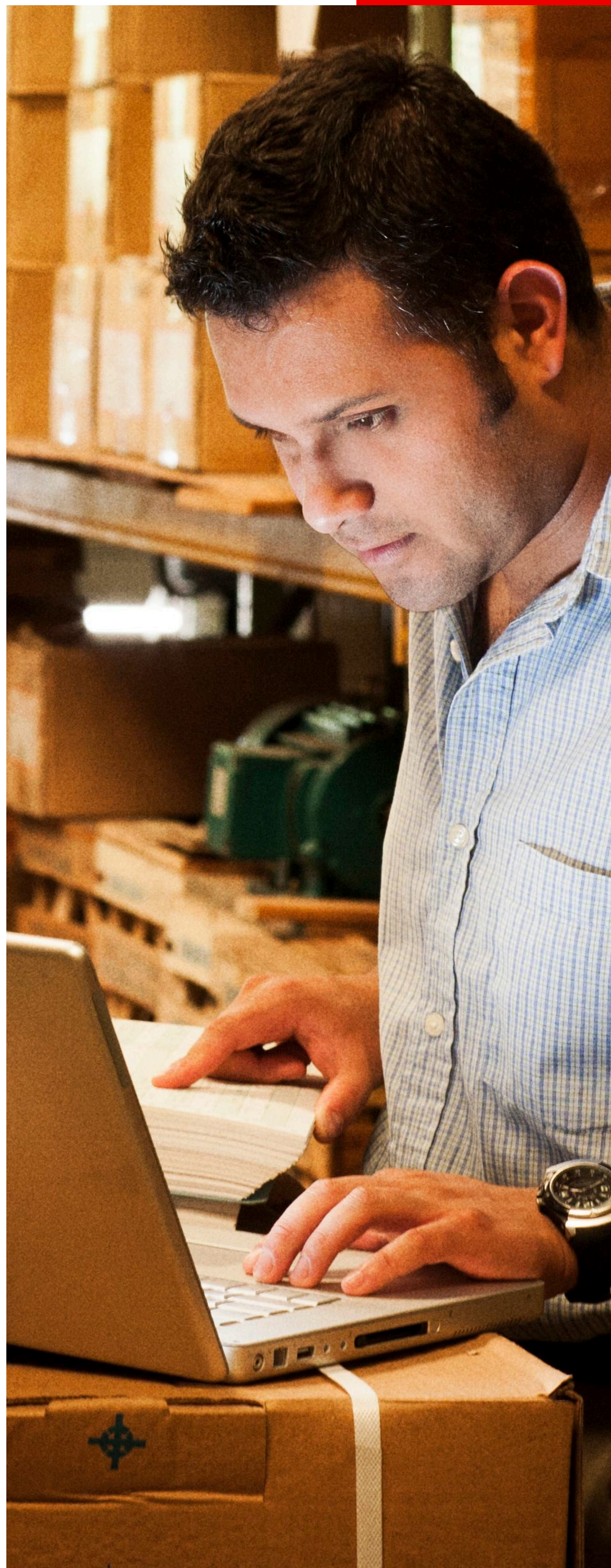
As for what comes next, routing changes are the most commonly planned operational change at 44%, followed by strategic customs investment at 43% and supplier changes at 38%. Thirty percent plan further manufacturing relocation in the next 18 months, continuing the shift away from Asia and toward North America, with Mexico as the primary destination. Meanwhile, 27% plan to eliminate product offerings and 20% plan to cease sales to additional countries. China (18 respondents) and Russia (7 respondents) are the most frequently cited future exit markets, while 11 respondents (all Canadian) plan to exit the U.S. entirely.

39% of respondents are fully prepared to implement changes immediately

30% require only minimal planning before acting

In terms of preparedness for future tariff changes, the data is more encouraging than the pace of change might suggest: 39% of respondents describe themselves as fully prepared to implement changes immediately if trade conditions deteriorate further and 30% say they require only minimal planning before acting. Combined, this means 69% can move quickly if the situation demands it. Retail, however, is the least ready, with only 32% fully prepared compared to 44% of technology companies. This gap reflects both the retail sector's ongoing operational disruption and the complexity of the de minimis-related changes it's still grappling with.

The companies best positioned for what comes next share a common trait: They didn't wait for certainty before acting. They diversified suppliers, built secondary manufacturing relationships, invested in CUSMA/USMCA compliance infrastructure and established contingency plans before they needed them. The opportunity to join that group is still open but it's narrowing.



Readiness for the 2026 CUSMA/USMCA review

The CUSMA/USMCA joint review is scheduled for July 1, 2026. This is an imminent inflection point that will shape the terms of North American trade for the next 16 years. For businesses that have spent the past 18 months adapting to a volatile tariff environment, the review presents both a risk and an opportunity. The question is whether they're positioned to respond to whatever comes next.

The answer for most is not yet.

How CUSMA/USMCA is being used today

Before examining readiness for the review, it's important to understand how deeply embedded CUSMA/USMCA certification has become in the day-to-day operations of North American cross-border shippers. For goods that qualify, CUSMA/USMCA certification is one of the most effective cost mitigation tools available. The businesses that invested in certification infrastructure before 2025 entered the current environment with an advantage.

Nearly three quarters (73%) of respondents currently use CUSMA/USMCA certification for cross-border shipping, a figure that has grown as tariff costs have made the ROI of certification clear. Canadian industrial companies have been among the most rigorous, with several making CUSMA/USMCA certificate collection a mandatory requirement on all inbound supplier shipments. Retail, on the other hand, has the lowest certification rates of any sector. This is largely because most retail sourcing originates in Asia rather than North America, putting CUSMA/USMCA protections out of reach for a significant portion of retail supply chains.

Learn more about CUSMA/USMCA

Awareness of the review: broad but shallow

Most respondents (70%) are aware that the CUSMA/USMCA review is coming in 2026, but awareness isn't the same as readiness. The depth of knowledge varies: Some companies are actively monitoring negotiating positions and lobbying through industry associations, while others know little beyond recent headlines.

The awareness gap is largest in retail: Only 61% of respondents know about the review compared to 74% for both industrial and healthcare. Given retail's significant exposure to a negative outcome, particularly around de minimis and cross-border e-commerce, that gap is a meaningful vulnerability. Canadian businesses are more likely to be aware and more likely to express concern than those in the U.S. This suggests that for many Canadian companies, CUSMA isn't a compliance exercise, but the foundation of their cross-border business model.

The dominant mood: uncertainty, not optimism

Among businesses that are aware of the review, more than four in five anticipate some level of disruption as a result, but Canadian companies are more likely to expect significant disruption (51%) than their U.S. counterparts (21%). Sentiment about what it will actually deliver also diverges by country: 69% of U.S. respondents are optimistic the renegotiation will create a more favorable environment for U.S. companies, while only 55% of Canadian respondents feel the same about outcomes for Canada. Only 50% of Canadian respondents believe the review will protect Canadian goods from future U.S. tariffs.

69%	55%
of U.S. respondents	of Canadian respondents

Are optimistic about the outcome of July's CUSMA/USMCA review

But this data goes beyond pessimism. Companies aren't asking whether the situation will improve—they're asking if it will hold. Even respondents that are open to a positive outcome expressed doubt that the current U.S. administration would honor any agreement reached. For many, this makes the renegotiation feel less like an opportunity and more like a risk management exercise.

Canadian industrial companies are the most pessimistic of any segment: 18% disagree or strongly disagree that the renegotiation will create a more favorable environment for Canadian companies and 40% are neutral, meaning fewer than half are genuinely optimistic. Canadian businesses are increasingly treating U.S. trade dependency as a structural risk to be managed and reduced, not a problem to be solved by the negotiation outcome.

The preparedness gap

Seventy-four percent of respondents who are aware of the review say they feel prepared, but most are tracking news and waiting for the outcome before committing to structural changes. That passive approach carries real risk, particularly for mid-market businesses that are large enough to be materially exposed but lack the government affairs teams and legal infrastructure that large enterprises use to monitor and shape the review process.

Among the 16% who say they aren't prepared, the gaps are specific: 69% need a better understanding of the review process and its implications, 56% want clarity on how specific product areas may be affected and 51% want more support from their courier and freight providers. Preparedness also varies on each side of the border, with U.S. respondents feeling more prepared than Canadian peers across every industry. U.S. healthcare leads at 88% and Canadian industrial lags at just 47%.

What the most prepared businesses are doing

Among Canadian companies taking a proactive approach, a consistent playbook has emerged: modeling best and worst-case tariff scenarios with finance teams, building secondary supplier relationships outside the U.S. to reduce single-geography dependency, making CUSMA/USMCA certificates of origin mandatory on all inbound shipments, lobbying through industry associations and upskilling teams to ensure sufficient CUSMA knowledge is in place when the outcome is known.

The businesses that have already made these moves aren't waiting to see what July brings. They've proactively built the flexibility to respond to whatever the CUSMA/USMCA review delivers.

What Canadian and U.S. businesses need from cross-border shipping partners

As tariffs have caused supply chain disruptions and compliance has grown more complex, the role of the cross-border shipping partner has changed. Businesses are no longer looking for a carrier that can move goods from point A to point B. They need a partner that can also help them navigate a global trade environment that few of them fully understand. Whether carriers are rising to that challenge is one of the more complicated findings in this research.

Most businesses lack clarity to navigate changing trade policies

Nearly 80% of respondents say they feel supported or very supported by their cross-border shipping providers in global trade matters. On the surface, this suggests the industry is performing well, but the country breakdown is murkier. U.S. respondents report feeling very supported at 30%, while only 16% of Canadian respondents say the same. Given that Canadian businesses are operating under greater tariff pressure, the gap between the support they are receiving and the support they need is wider than it is south of the border.

The qualitative data is more direct. During peak tariff volatility, when businesses needed clarity most, many carriers were described as companions in confusion rather than guides. Communication was lacking when it mattered most and guidance was inconsistent. When businesses needed proactive counsel, some carriers were largely reactive given the rapid changes from one week to the next.

Four specific pain points surfaced repeatedly across the interviews. Internal fragmentation (such as siloed teams, separate billing divisions, high staff turnover and no single point of contact) left clients wading through carrier bureaucracy when they needed fast, clear answers. Communication slowed during peak volatility and never fully recovered in terms of trust. Relationships remained transactional, with some carriers failing to bring proactive insights or engage at a senior level. And when shipment delays and border holds arrived without warning, invoices often lagged two to four weeks later along with unexpected clearance and tariff charges.

How cross-border shipping partners are helping and where they can provide more support

The businesses that feel most genuinely supported are mid-market companies with real tariff exposure but limited internal capacity to manage it. For them, a cross-border shipping carrier that brings proactive analysis and operational guidance fills a gap that would otherwise require a consultant or trade law firm. The value is tangible and the loyalty it generates is real.

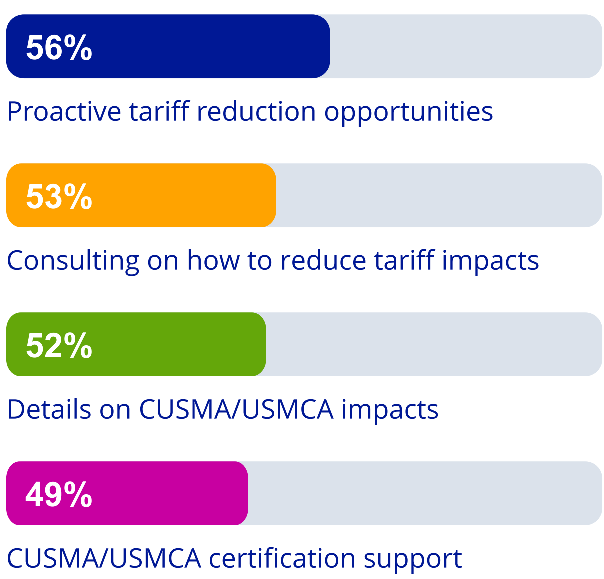
The businesses that feel least served sit at both ends of the size spectrum. Large enterprises have outgrown the standard carrier support model: They have their own government affairs teams, trade lawyers and customs specialists, and what they want from a carrier is execution and visibility, not advice. Small businesses, on the other hand, often cannot access the strategic-level support that carriers reserve for high-spend accounts, leaving them feeling ignored when their exposure is highest.

Carrier relationships are also under greater commercial scrutiny. With duty outlays up significantly, shipping spend is being reviewed more carefully across organizations. According to many shippers, companies are actively using requests for proposals as a lever for price negotiation due to the perceived surplus of carrier capacity, even though many say they don't intend to switch due to complexity and time sensitivity.

What shippers actually want

The data on desired support is specific and consistent. More than half (56%) of respondents want proactive analysis of their shipments to identify tariff reduction opportunities, and this was the most requested form of support. Fifty-three percent want consulting on operational adjustments they can make to reduce tariff impacts. Fifty-two percent want details on how CUSMA/USMCA specifically affects their business and 49% want direct support in obtaining CUSMA/USMCA certification.

What shippers are looking for



The country and industry breakdown shows important differences. U.S. industrial companies want proactive tariff fee analysis at 58% (vs. 44% for Canadian peers), suggesting the advisory gap on the U.S. side may be larger than it appears. Retail companies in both countries want CUSMA/USMCA certification support at notably high rates, revealing the sector's low existing certification rates and growing awareness of what that gap costs them. Technology companies in Canada are the most likely of any segment to want consulting on operational adjustments (66%), which shows the compliance complexity that the sector is navigating without easy structural options.

The common thread across all of the data is a request for proactivity. Businesses don't want to call their cross-border shipping carrier when something goes wrong and hope for a useful answer. They want a partner that's already analyzing their exposure, tracking the CUSMA/USMCA review and bringing them the information they need before they know to ask for it.

What to look for in a cross-border shipping partner

The providers that close these gaps in the months ahead will earn something more durable than a contract renewal. As the data suggests, businesses that feel genuinely supported by their cross-border shipping carriers are more likely to consolidate volume, extend contracts and stay loyal through uncertainty.

Those requests for proactivity are a natural follow to what shippers have been missing. During peak tariff volatility, some carriers were slow to communicate, inconsistent in their support and reactive when businesses needed tangible solutions.

This left businesses struggling to know who to contact when something went wrong, ultimately eroding trust in their shipping partners.

The businesses that navigated this period best had partners that were already analyzing their exposure, flagging CUSMA/USMCA implications for their specific goods and bringing clarity before they were asked. Shippers that are evaluating whether their current carrier is meeting that bar should ask: Is your carrier proactively identifying tariff reduction opportunities in your shipments? Are they bringing you CUSMA/USMCA guidance that's specific to your business? Do you have a single point of escalation when conditions change?

With the CUSMA/USMCA review weeks away, now is the time to demonstrate that value. The carriers that show up as partners before July will earn the business on the other side of it.

> "I switched to a different shipping provider because tariffs have complicated the process, causing sales and shipment delays that negatively affect my customers."
>
> — *Retail company*

Key takeaways by industry

The research tells the overarching story about the current state of North American trade, but the chapter each industry is living through is distinct. Here's a snapshot of where each sector stands, what the data says about their exposure and what cross-border shippers in each vertical need most heading into the July 2026 CUSMA/USMCA review.

Industrial: the most exposed and the most active

Industrial companies are absorbing the broadest and deepest tariff pressure of any sector in this research. They report the highest concern about tariffs, have made the most aggressive structural changes and face the steepest climb ahead of the CUSMA/USMCA review.

For industrial companies sourcing steel, metal and aluminum, the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) presents a meaningful and underutilized mitigation opportunity. By shipping directly from Europe into Canada under CETA, industrial companies can significantly reduce or in some cases eliminate counter-tariffs on these materials, a direct alternative to U.S.-sourced inputs that are subject to current tariff escalations. Industrial shippers with European supplier relationships, or those evaluating new ones, should assess their CETA eligibility as part of their near-term tariff exposure audit.

Learn more about the industrial sector's response to tariffs

Industrial snapshot

4x more likely to eliminate product lines

18% of Canadian respondents are pessimistic about the outcome of the review

56% of U.S. respondents have invested in strategic customs practices

- Industrial companies are more likely than any other sector to have relocated manufacturing, ceased sales to certain countries and eliminated product offerings entirely.
- Canadian industrial companies are over four times more likely than their U.S. industrial peers to plan product eliminations in the next 18 months.
- 18% of Canadian industrial respondents disagree or strongly disagree that the CUSMA renegotiation will create a more favorable environment, the highest pessimism rate of any sector.
- Despite that pessimism, industrial has the highest CUSMA/USMCA engagement rates outside healthcare, treating certification as a cost mitigation tool rather than a compliance exercise.
- U.S. industrial companies plan to invest in strategic customs practices at higher rates than Canadian peers (56% vs. 40%), while Canadian industrial companies are more likely to exit markets and eliminate products.

What industrial shippers need most

- Proactive tariff fee analysis
- CUSMA/USMCA certification support
- A cross-border shipping partner that brings operational guidance rather than waiting to be asked

Learn more about the retail sector's response to tariffs

Retail: the most disrupted and the least prepared

On top of general tariff pressure, retail has been hit by the suspension of the de minimis exemption, which has disrupted cross-border e-commerce and retail logistics in ways that no other sector has experienced. And with the lowest CUSMA/USMCA awareness and certification rates of any vertical, retail enters the July review with the most ground to make up.

Learn more about the retail sector's response to tariffs

Retail snapshot

70% of Canadian companies have lost customers (vs. 41% in the U.S.)

61% are aware of CUSMA/ USMCA review

De minimis impact has deeply affected retail companies in both countries

- Canadian retail companies are 1.7 times more likely to report customer losses than their U.S. counterparts (70% vs. 41%).
- The suspension of the de minimis exemption has hit retail harder than any other sector. One respondent has shut down U.S. shipping entirely and another is absorbing hundreds of millions in new costs.
- Retail has the lowest awareness of the upcoming CUSMA/USMCA review of any sector (61% vs. 74% for industrial and healthcare).
- Despite lower awareness, retail companies are more optimistic about CUSMA/USMCA outcomes than industrial peers, but this disconnect may reflect lower familiarity with the stakes rather than genuine grounds for confidence.
- Canadian retail companies are 1.5 times more likely than U.S. peers to have changed their routing and shipping of goods.

What retail shippers need most

- Clarity on de minimis implications
- CUSMA/USMCA certification guidance
- Support building e-commerce logistics strategies that don't depend on cross-border duty-free thresholds that no longer exist

Explore how Purolator supports retail shippers

Healthcare: largely insulated but watching closely

Healthcare is the outlier in this dataset. Broad tariff exemptions under CUSMA/USMCA HTS classifications have insulated the sector from the immediate financial shock other industries are absorbing—but that protection cannot be viewed as permanent. Similarly, domestic-heavy supply chains have provided additional insulation from the tariff pressure hitting other sectors, but since many goods are sourced from beyond North America, those protections are not catch-alls. Canadian healthcare companies are already acting, suggesting the sector is not taking its protected status for granted.

Learn more about the healthcare sector's response to tariffs

Healthcare snapshot

Low Concern	Lowest concern levels of any industry
2x	more likely to change routing for Canadian companies
80%	of U.S. organizations are optimistic

- Healthcare reports the lowest concern levels and fewest structural operational changes of any sector. This is a direct result of tariff-exempt HTS classifications and domestic sourcing rather than lower exposure.
- Canadian healthcare companies are nearly twice as likely as U.S. peers to be changing their routing and shipping of goods, suggesting proactive repositioning even among the sector's least-affected organizations.
- U.S. healthcare companies are the most optimistic of any segment about CUSMA/ USMCA outcomes (80% agree or strongly agree that renegotiation will create a more favorable environment).

- Canadian healthcare companies are more cautious, citing the view that the U.S. holds structural leverage in any renegotiation.
- Healthcare companies report the highest rates of feeling very supported by their cross-border shipping providers, but they still cite inconsistent guidance during peak volatility as a meaningful gap.

What healthcare shippers need most

- Continued clarity on HTS code classifications and exemption status
- Scenario planning support for potential CUSMA/USMCA renegotiation outcomes that touch exempt categories
- Proactive communication during peak volatility

Explore how Purolator supports healthcare shippers

Technology: exposed but constrained

Technology companies face a logistical challenge that separates them from the other sectors: Most manufacturing occurs abroad in Asia, leaving limited ability to nearshore or reshore quickly in response to tariffs. The primary burden has been compliance complexity and the sector is responding primarily through customs investment rather than supply chain restructuring.

Learn more about the technology sector's response to tariffs

Technology snapshot

1.5x | U.S. companies are 1.5x more likely to invest in customs practices

66% | of Canadian companies want operational consulting

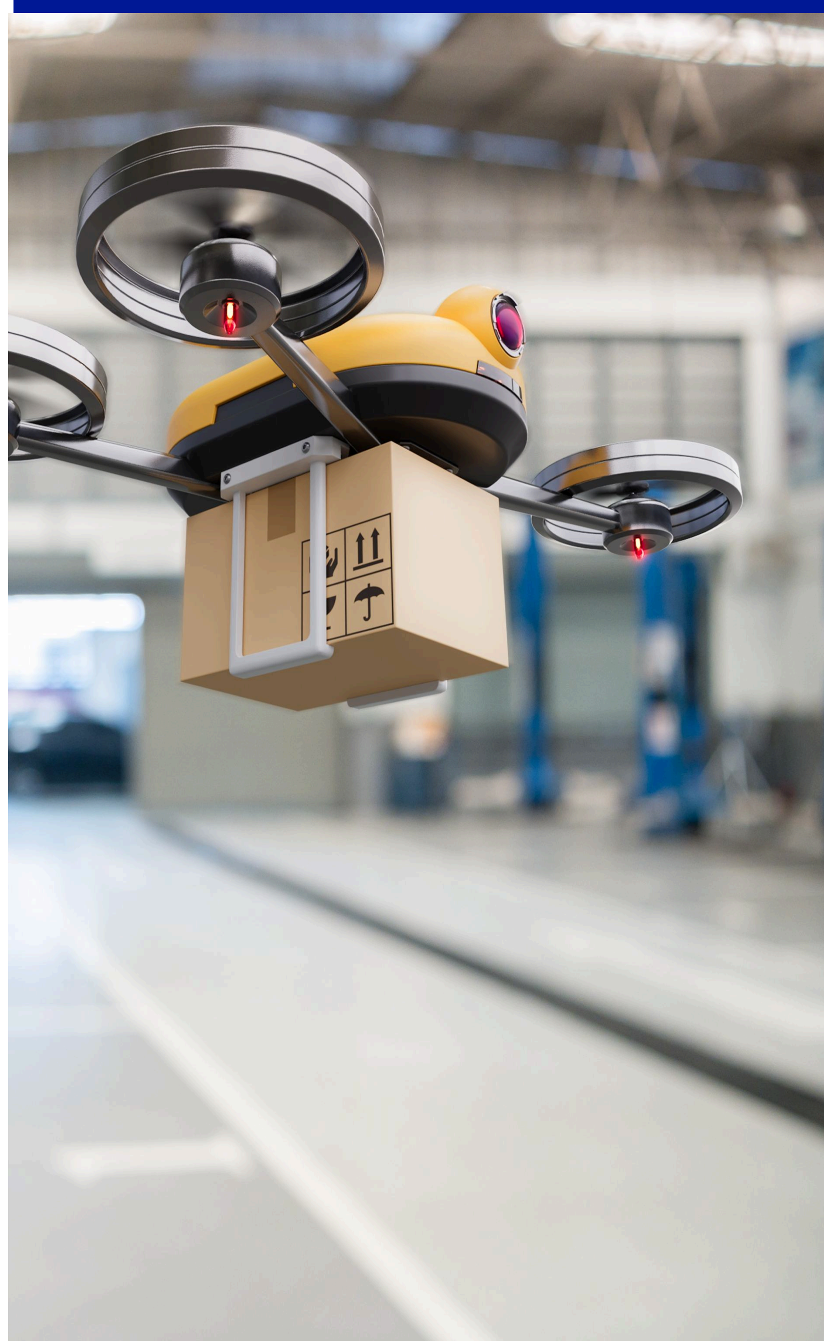
#1 sector | Leaders in moving manufacturing to Mexico

- Technology companies report moderate tariff impacts relative to industrial and retail, but they're not unaffected. Compliance and paperwork complexity has become a significant operational burden.
- U.S. technology companies are 1.5 times more likely than Canadian peers to invest in strategic customs practices in the next 18 months, reflecting a growing recognition that compliance infrastructure is becoming a competitive differentiator.
- Technology companies in Canada are the most likely of any segment to want consulting on operational adjustments from their cross-border shipping partners (66%). This suggests the sector is navigating compliance complexity without easy structural options.
- Technology is leading manufacturing moves to Mexico in the past 18 months (11 of 23 total), suggesting that where restructuring is possible, tech companies are moving decisively.
- Beyond Mexico, a China +1 sourcing strategy is an emerging trend for technology supply chains, with Vietnam increasingly cited as a primary destination.
- U.S.-based free trade zones are also becoming a strong routing tool for technology companies moving volumes into Canada. By staging goods in a U.S. FTZ before cross-border shipment, companies can manage duty timing, reduce per-unit customs costs and improve supply chain flexibility.
- Technology companies report relatively high preparedness for the CUSMA/USMCA review (44% fully prepared), the highest of any sector alongside healthcare.

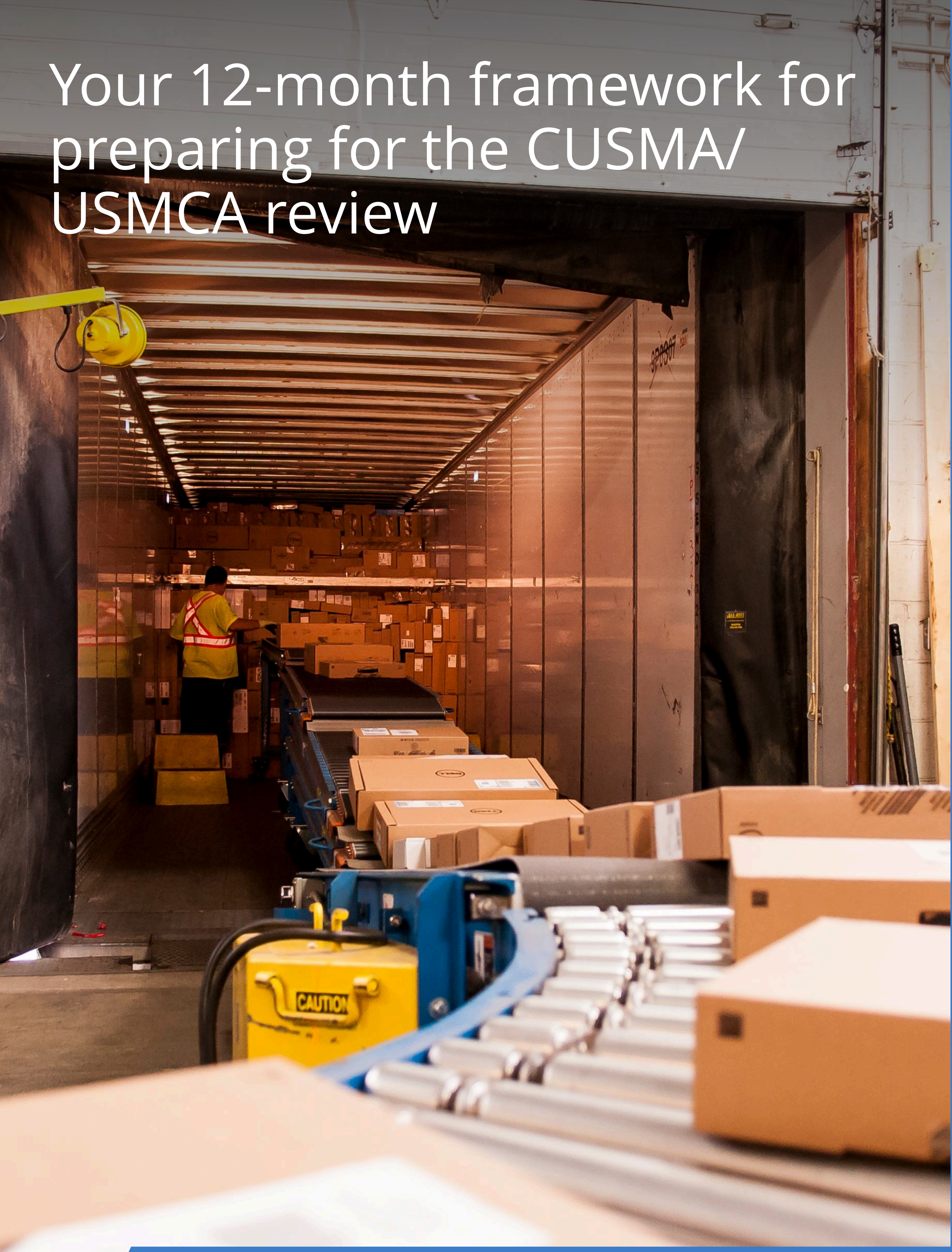
What technology shippers need most

- Operational adjustment consulting
- HTS reclassification guidance
- Customs compliance support, particularly for companies navigating rules of origin complexity as they shift manufacturing locations

Explore how Purolator supports technology shippers



Your 12-month framework for preparing for the CUSMA/ USMCA review



The data shows that proactivity wins in the face of tariff uncertainty. The most prepared businesses acted early, built flexibility before they needed it and found cross-border shipping partners that could add clarity when conditions shifted. With the CUSMA/USMCA review now weeks away, the time to act is now.

Immediate actions (0–3 months)

1. **Audit your CUSMA/USMCA certification coverage.** Map every cross-border SKU against current rules of origin requirements, identify gaps where certification isn't being claimed and make certificate of origin collection a mandatory supplier requirement if you have not already.
2. **Map your tariff exposure by product and supplier origin.** Build a complete picture of duty outlays by SKU, supplier country and shipment lane. Then pressure-test your numbers against the 23% revenue impact benchmark from this research. If your exposure is significantly above that average, prioritize accordingly.
3. **Establish a single point of escalation with your cross-border shipping partner.** With the CUSMA/USMCA review set to bring disruption, evaluate your [cross-border shipping partner] to ensure they have the right expertise to guide you through the complexity in real time. If you see gaps, Livingston International is here to help, giving you the expertise to navigate cross-border complexity with confidence.

Near-term moves (3–6 months)

1. **Decide your trigger points before July.** Model best- and worst-case scenarios for the outcome of the review so you can make pricing decisions, contract renewals and capital commitments with eyes open. Right now, 74% of respondents are waiting for the outcome before preparing and that strategy leaves businesses scrambling.
2. **Evaluate routing through Canada and Mexico.** CUSMA-compliant routing through Mexico can reduce direct Canada-U.S. border exposure while keeping goods within the trade agreement's protections. This trend is already underway, with 41 DC and manufacturing moves to Mexico recorded in this research alone.
3. **Begin supplier diversification conversations now.** Build secondary supplier relationships before you need them. Thirty-eight percent of respondents plan to make supplier changes in the next 18 months. The companies that start those conversations early will experience far less disruption when the time comes.
4. **Add tariff language to contracts coming up for renewal.** With 86% of respondents expecting pricing changes in the next 18 months, contracts without tariff pass-through language are a growing source of financial exposure.

Strategic positioning (6–12 months)

1. **Invest in strategic customs infrastructure.** Invest in strategic customs infrastructure. Free trade agreement optimization, tariff engineering, HTS reclassification, duty drawback programs, and the use of foreign trade zones and bonded warehouses can materially reduce tariff exposure. For technology companies routing volumes through the U.S. into Canada, FTZ strategies in particular offer meaningful flexibility in managing duty timing and per-unit costs. At current duty rates, the ROI on compliance infrastructure investment has never been clearer. Read more on how to improve logistics efficiency.
2. **Reduce single-geography dependency.** The Canadian businesses that entered 2025 with diversified supply chains absorbed the tariff escalations with significantly less disruption. Building that diversification now, while it's a strategic choice rather than an emergency response to tariffs, is the most durable form of tariff resilience available.
3. **For Canadian companies:** evaluate your U.S. distribution footprint. The de minimis suspension has changed the economics of cross-border e-commerce. Companies that rely on low-value cross-border shipments to serve U.S. customers should model whether a U.S.-based fulfillment presence changes the math. Learn how Canada's free trade agreements can provide tariff relief.
4. **Engage with trade associations.** Industry associations provide intelligence, benchmarking and early visibility into negotiating positions that individual companies cannot access alone. The period between now and July is the most valuable time to establish that relationship.

Conclusion:

Certainty is the new competitive advantage in cross-border shipping

The businesses that are navigating a changing trade environment best don't have the deepest pockets or the most sophisticated legal teams. They're the organizations that chose to act before they had to and treated tariff uncertainty as a signal to move. They diversified suppliers before upheaval forced them to. They invested in CUSMA/USMCA certification before the ROI became obvious. They built contingency plans before the contingency arrived. And they found cross-border shipping partners that brought them clarity when the environment offered none.

That's the throughline in this research: not the tariff rates, the compliance complexity or the pessimism about what July will deliver, but the consistent, measurable difference between businesses that moved early and businesses that are still catching up. And there's still time.

What to expect in the next six months

The CUSMA/USMCA review will not resolve the uncertainty that has defined the past 18 months. Even a favorable outcome will be followed by a period of interpretation, implementation and adjustment. An unfavorable outcome will trigger another wave of restructuring. And the most likely outcome—one that delivers something in between—will require businesses on both sides of the border to quickly assess what changed, what didn't and what it means for their specific supply chain.

The role of the right partner in cross-border shipping

As we learned from the research, businesses that don't feel prepared for the CUSMA/USMCA review said they want more support from their courier and freight providers. That's a clear signal that the cross-border shipping partner relationship has the potential to become something far more than a transactional one.

The carriers that show up in the months ahead as genuine partners will earn loyalty that outlasts tariff uncertainty. They'll proactively analyze tariff exposure, bring clarity on CUSMA/USMCA implications, provide a single point of escalation and stay ahead of the review rather than reacting to it. Purolator has been in the middle of these conversations with Canadian and U.S. shippers across every industry.

Customs and trade compliance expertise through Livingston International

Through our acquisition of Livingston International, North America's leading customs broker, Purolator offers trade compliance expertise, CUSMA/USMCA certification support and HS code guidance that goes beyond general carrier service. Livingston trade experts ensure all shipments are in full compliance with customs mandates while identifying opportunities for customs efficiency and cost savings.

Tariff exposure analysis and consulting

For shippers who want to understand their tariff exposure before problems arise, the Purolator Trade Assistant offers immediate access to customs forms and documentation, tariff classification codes and duty estimates on U.S.-bound shipments. For those working through what the CUSMA/USMCA review means for their specific product mix and supplier network, Purolator and Livingston also host tariff-focused webinars designed to turn a complex regulatory environment into concrete next steps.

A single point of contact

In the current trade environment, delayed communication is one of the most cited frustrations that shippers have with carriers. That's why every Purolator customer is assigned a dedicated representative who has complete visibility into their account and proactively monitors their shipments to surface issues before they become a problem. If a customer does need to escalate a concern, they have their account executive's direct contact information and know exactly who to call.

Network reach and operational execution

With over 65 years operating as one of Canada's largest integrated freight and courier network—delivering to 100% of Canadian postal codes—Purolator brings the operational reach to back our advisory perspective with execution. We also offer shipping consolidation services to help businesses reduce costs, improve transit time and simplify the customs clearance process.

Our goal is to quiet the noise around tariff uncertainty and help shippers move from exposure to action. Purolator understands both sides of the border and we have the tools to navigate what comes next.

Supply chain redesign through Global Solutioning

For businesses facing the most complex supply chain challenges—whether restructuring away from single-geography dependency, evaluating nearshoring options or building an entirely new cross-border logistics architecture—Purolator's Global Solutioning capability uses industrial engineers and AI-based technology to design and deploy customized, end-to-end supply chain solutions. Working directly with customers, the Global Solutioning team models and builds supply chains that improve speed to market, enhance customer experience and reduce overall cost, going beyond tariff mitigation to reimagine what an optimized supply chain looks like in the current trade environment.

A final word on preparing for the CUSMA/USMCA review

The past 18 months have tested North American businesses in ways that few anticipated and none chose. The tariffs have been disruptive but the uncertainty has been worse. Whatever the July review delivers, it will not be the last chapter in this story.

The research in this report also captures a business community that has proven more adaptable than the circumstances might have predicted. The path forward requires the same resilience that has defined the businesses weathering the storm best: the willingness to act before certainty arrives, with partners who can help make sense of an unclear global trade environment.

As experts in cross-border shipping across industries, Purolator commissioned this research so you don't have to navigate what comes next alone.

Speak To A Purolator Cross-Border Expert. [Partner With Us]

About Purolator

Purolator Inc. is a leading integrated freight, package and logistics solutions provider. Delivering its customers' promises since 1960, Purolator continues to expand its reach, renowned service levels and reliability to more people, more businesses and more places across Canada and around the world, utilizing 175+ facilities across Canada and 30+ branches in the United States. Purolator is committed to contributing to the well-being of the communities it serves and where more than 14,000 of its employees live, work and play.

Methodology

This research was commissioned by Purolator and conducted independently by HelloInfo in early 2026. The quantitative survey captured responses from 348 supply chain and logistics decision-makers across the United States and Canada, split equally between both countries and representing four industries: industrial, retail, healthcare and technology supply chains. Company sizes ranged from under 500 to more than 5,000 employees. The quantitative survey was complemented by 41 in-depth interviews with logistics and procurement leaders across both countries. Purolator was not identified as the sponsor during data collection to ensure the integrity and objectivity of the findings. Of 2,911 survey starts, 42 were disqualified due to lack of CUSMA/USMCA awareness, indicating the research captured a well-informed respondent pool with meaningful exposure to cross-border trade and certification practices.

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