



VLANJ SOLUTIONS

CASE STUDY: GLOBAL TRADE MITIGATIONS AND IMPACT TO SUPPLY NETWORKS FOR CANADIAN MANUFACTURERS EXPORTING TO THE USA

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EXECUTIVE SUMMARY

Canadian consumer goods manufacturers are facing a growing need to proactively mitigate the impacts of trade volatility, particularly as their supply chains remain heavily concentrated in the U.S. market. With evolving tariff policies and geopolitical uncertainty, the resilience of Canadian firms increasingly depends on how well they can anticipate and adapt to cross-border disruptions. This project explores how manufacturers in two of Canada's largest consumer goods export sectors, specifically processed food and paper goods, are responding to these challenges and how their actions can inform a broader resilience framework.

Our team conducted an in-depth case study analysis of Maple Leaf Foods and Kruger Inc., selected for their significant U.S. export exposure, domestic manufacturing investment, and representation of tariff-impacted sectors. We examined their trade footprints, production strategies, and organizational responses to recent disruptions. The findings surfaced five key activities that contributed to their resilience: simplifying operations through plant consolidation, diversifying export markets, offshoring production strategically to serve new demand, building internal supplier redundancy, and engaging domestic consumers through targeted campaigns.

These insights informed the development of a People–Process–Technology framework, shaping a three-pronged strategy that helps manufacturers proactively respond to tariff disruptions by strengthening capabilities, streamlining operations, and leveraging technology for strategic adaptability.

The People element focuses on establishing strong supplier relationships, supplier collaboration practices and empowering internal teams with compliance knowledge. The Process element targets simplification strategies, from consolidated production to alternate sourcing models that enable operational pivots. The Technology element defines tools that enable resilience through real-time material tracking, internal reuse systems, and scenario modeling that supports proactive planning. These integrated actions equip firms to navigate evolving trade environments with greater control.

This framework offers a pathway for Deloitte and other stakeholders to support Canadian manufacturers in building durable, adaptable operations. We recommend integrating resilience modeling into core supply chain services, helping clients identify their exposure, simulate trade shocks, and prioritize interventions. By shifting from reactive responses to proactive design, firms can turn trade turbulence into an opportunity for competitive positioning.