



COVID-19

Cargo transport's nimble new future

Orchestrating agile, scalable transport and logistics
networks during the recovery and beyond

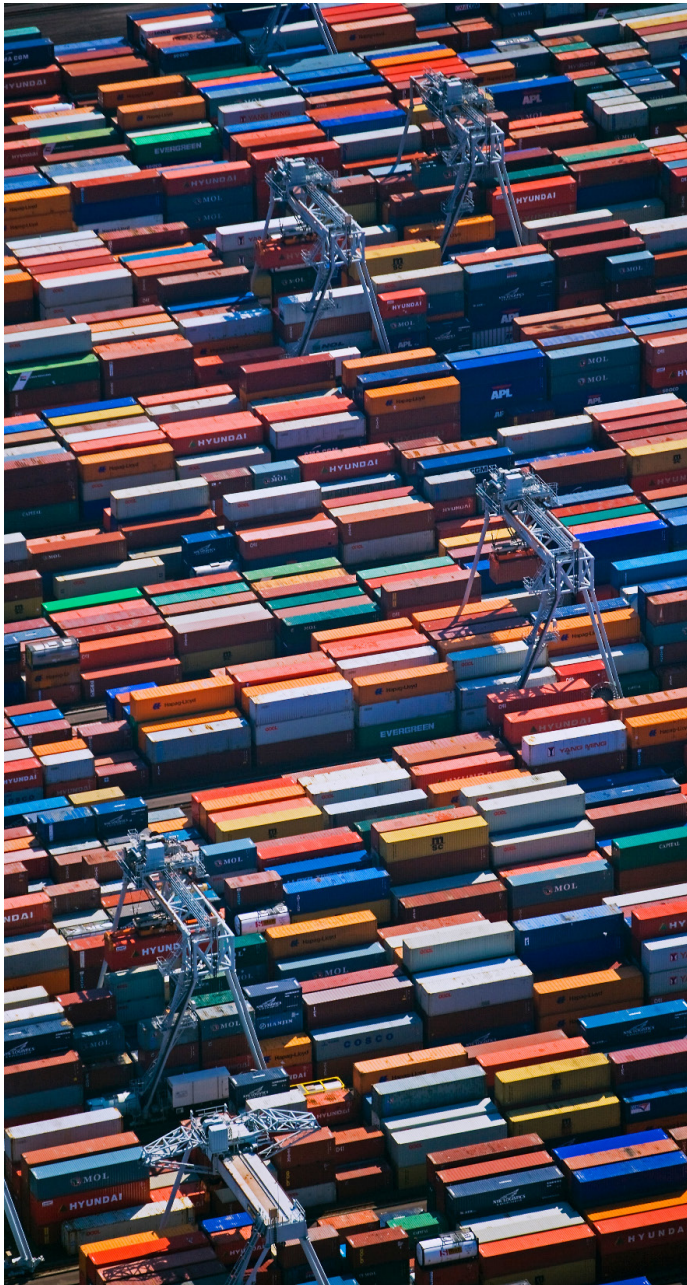
Introduction

The COVID-19 crisis has dealt a serious blow to the global transport and logistics industry, but it has failed to land a knockout punch. The World Trade Organization forecasts that global trade volumes could fall by up to 32 percent in 2020, before recovering in 2021 and 2022.¹ Deloitte research indicates the North American sector's revenue could drop 15 to 30 percent this year, while operating income could fall 25 to 40 percent.² In Canada, marine, rail, and road transport GDP is forecast to drop from \$142 billion in 2019 to \$124 billion—or even as low as \$97 billion—in 2020.³

Transport and logistics companies worldwide have faced significant challenges because of the pandemic and the ensuing lockdowns and economic slump. Rail in particular has been hit hard by lower overall demand for bulk commodities, while the trucking sector has experienced a more modest impact. The decision to keep the Canada-US border open for trade has greatly helped in this regard, as have changing consumer behaviours and the accelerated adoption of e-commerce.

As countries begin to lift restrictions, reopen economies, and take their first steps toward recovery, the global transportation sector must adapt and evolve to deal with COVID-19's lasting impact on consumers and supply chains alike. Consumers are increasingly shopping online, and their delivery expectations continue to rise. Supply chains are becoming supply networks as organizations search for ways to not only ensure goods continue to flow despite COVID-19-related interruptions, but to be more resilient to disruptions in the future. In response, transportation companies are under pressure to be nimbler and more flexible than ever while simultaneously being seen as a greater partner in emerging supply networks.

In this report, we explore some of the trends reshaping how transport and logistics companies service the needs of consumers and business supply chains. We also look at how these companies must adapt and build agility to address industry needs by focusing less on control and more on orchestration.



Trends shaping the next normal for transport and logistics providers: shifts in consumer behaviour

As authorities issued stay-at-home orders and shut down offices, stores, and other public venues, the way we live, work, and shop was swiftly upended. Many Canadian consumers continue to work from home, though some are working fewer hours or remain out of work. They're guarded about their discretionary spending, focusing on the essentials. They're also concerned about the health and safety of themselves and their families. As a result, consumers are changing what and how they buy—and these changing behaviours are having a significant impact on the transportation sector.

Consumer spending shifts to essentials

Consumers' spending priorities quickly shifted as the COVID-19 crisis took hold and authorities took action. According to Deloitte's State of the Consumer Tracker, Canadian consumers plan to spend 27 percent more on groceries and 13 percent more on everyday household goods in the next four weeks, while they expect to spend less on discretionary items such as clothing and footwear (down 21 percent), electronics (down 22 percent), and furnishings (down 30 percent).⁴ Many of these changes in spending patterns are likely to be temporary, reflecting caution in a time of great uncertainty; as conditions improve and consumer confidence returns, discretionary spending in some categories should rebound. However, some shifts may prove to be more permanent.

Online shopping accelerates

While Canadians' online spending has long been increasing, COVID-19 has given the trend a significant boost. Consumers of all ages have turned to online retailers for essentials and discretionary items alike during the crisis.

Sixty-five percent of Canadian consumers say they intend to purchase books mainly or completely online in future; it's a similar story for electronics (58 percent), restaurant food (51 percent), and clothing and footwear (51 percent).⁵ That's a marked increase from pre-pandemic days, when Canadians were less likely to go online to buy clothing (42 percent), books (34 percent), or electronics (32 percent).⁶

Canadians' surging embrace of e-commerce may prove to be a change that lasts long after the pandemic abates. The event seems to have condensed years of expected Canadian online shopping growth into a matter of weeks, bringing the country closer to the level of e-commerce seen in Europe and Asia. "It almost became 2030 overnight," remarked Craig Miller, chief product officer at Shopify, in a recent interview.⁷ When Empire Co. Ltd.'s Sobeys grocery chain was preparing to launch its Voilà e-commerce service in June, demand was anticipated to be three times as high as originally expected.⁸

For the transportation and logistics sector, the acceleration of e-commerce adoption translates into greater business-to-consumer (B2C) package volumes and even more pressure on last-mile delivery performance.

The last mile is critical—and expectations are rising

As Canadians sheltered in place and followed physical distancing guidelines, their reliance on speedy, efficient last-mile delivery services surged, especially as they turned to home delivery for everything from groceries and restaurant meals to the furniture and supplies needed to kit out their new home offices. For consumers unable or unwilling to leave their homes, last-mile delivery firms have been a lifeline.

That doesn't mean they don't have high expectations of their last-mile delivery providers. Even before the pandemic hit, Deloitte research found that consumers were placing more—and more frequent—orders, demanding more delivery options, and expecting fast, free shipping.⁹ Consumers may rely on home delivery today, but as restrictions ease and the economy reopens, it's likely they will once again want to have purchases shipped to their local store or "click-and-collect" locker, or reserve products online and pick them up in-store.

Responding to the last-mile surge

Companies have raced to adapt to changing consumer behaviours and the dramatic rise in last-mile delivery activity idue to COVID-19 lockdowns. Retail giant Walmart, for example, launched Express Delivery, a two-hour delivery service that capitalizes on its existing stores and logistics network to ensure speedy delivery of products to consumers.¹⁰

OneRail, a last-mile delivery orchestration and fulfillment platform based in Orlando, Florida, launched its new QuickStart service to help retailers access more last-mile delivery capacity to meet the COVID-19-driven demand. Once a delivery order is reached, OneRail automatically sizes and dispatches the order to one of its 75,000-plus couriers, with the dispatch determined by the company's cloud solution based on distance, capacity, weight, and delivery time.¹¹

Cincinnati, Ohio-based Frayt scaled up its delivery network to provide same-hour delivery of goods to help companies ship products to their customers. Frayt's on-demand shipping and delivery platform links shippers and drivers directly, which means companies can typically find a driver for their shipment within an hour—ideal for meeting demanding customers' expectations.¹²

Facing rising costs and complexity, transport and logistics seek to innovate

Consumers' changing behaviours and rising expectations come at a time when cargo, transport, and logistics companies are already grappling with tough challenges caused by the pandemic, including supply chain complexity and rising costs.

COVID-19 lockdowns and border closures have played havoc with the world's supply chains, exposing their fragility. As manufacturers and distributors adapt to the realities of operating in uncertain times, the linear, ruthlessly efficient pre-pandemic supply chain is giving way to more complex, flexible, multifaceted supply networks. For transport companies, this means goods may need to be picked up from multiple locations rather than a single one, which increases the time and costs involved in getting those goods to customers.

At the same time, transport and logistics companies must also incorporate rigorous new cleaning protocols to protect the health and safety of both workers and customers. Delivery vehicles must be thoroughly cleaned before and after the daily delivery cycle; drivers must be supplied with masks and gloves; contactless delivery technologies and practices have had to be hurriedly introduced. Independent subcontractors must also be monitored to ensure they abide by the new protocols as well, which is not an easy task. While these new measures are critical for the foreseeable future, they introduce new costs and operational challenges for the industry.

It's also becoming more challenging for transport and logistics companies to keep up with fleet maintenance. Increased e-commerce package volumes and growing last-mile needs are keeping utilization of last-mile fleets high, and what downtime exists is often used for vehicle cleaning and disinfection. Meanwhile, other equipment, ill-suited for urban deliveries, sits idle. Maintenance is undoubtedly important; finding the time to do it is increasingly difficult. In time, this will contribute to rising fleet costs for companies across the sector.

With last-mile delivery responsible for roughly 40 percent of overall logistics costs, it's little wonder that many companies are exploring alternatives. These include establishing more delivery nodes in urban centres—new pickup points or so-called “dark stores” that allow packages to be picked up closer to customers and avoid the need for drivers to return to larger, more centralized distribution centres. Some companies are even exploring the use of drones: Drone Delivery Canada, for example, is set to use cargo drones to deliver personal protective equipment (PPE), COVID-19 test kits, and more to Ontario's Beausoleil First Nation, located on Christian Island in Georgian Bay.¹³



Preparing for the future: shifts in business supply chains

While evolving consumer behaviours and expectations are playing a key part in reshaping the transport industry's future, supply chains are also undergoing significant changes in response to the COVID-19 crisis. We see five fundamental supply-chain shifts underway that will affect transport and logistics companies globally. To thrive beyond the pandemic, organizations must understand and adapt to these changes.

1. Efficiency traded for resiliency

Before COVID-19, industries and businesses mainly focused on the efficiency, speed, and reliability of their supply chains. Supply chain risk rarely got much attention at a time when goods crossed oceans and continents with ease. Then the pandemic hit and delivered a sobering lesson on how quickly those global supply chains could be disrupted, slowed, and even stopped.

The experience is driving companies to rethink their supply chain approach and start managing the risk with the same rigour they devote to financial, operational, cybersecurity, and corporate social responsibility risk. Rather than focusing on supply chains only when a link breaks, companies will increasingly manage supply chains and supply chain risk using integrated, agile approaches and always-on planning and execution. A supply chain's resilience, its capacity to flow around unexpected obstacles and interruptions, will matter just as much as its overall efficiency.

This heightened focus on supply chain resilience will impact transport and logistics companies in many ways. Employee health and safety will become of even greater concern, both to protect drivers and to avoid shutting down a key link in the supply chain. Companies in the sector may be called on to serve as a supply chain “buffer,” by helping manufacturers and distributors manage or pre-position inventory closer to end customers. And shippers at all levels will need to re-evaluate their operating models and other options as they contemplate the demands of supply chain resilience: interruptions, delays, price increases, and more will all need to be considered.

2. Chains give way to networks

As well as showing how quickly modern supply chains can be disrupted, the COVID-19 crisis has also illustrated the pitfalls of companies' reliance on linear supply chains. The shutdown of a single factory, port, or distribution centre could throw an entire supply chain into disarray. In response, organizations at all points along the supply chain are diversifying their sources of supply to ensure access to goods when one or more suppliers—or one of their suppliers—becomes unavailable.

As a result, linear supply chains are giving way to dynamic, multi-node supply networks that permits improved visibility and responsiveness. These supply networks facilitate a dynamic flow of material, money, and data that enables network participants to best align supply and demand while taking into account current network constraints. This agility comes at the cost of greater complexity, however: organizations need to collaborate and synchronize their operations and information flows in order to optimize the network.

The shift from linear supply chains to multifaceted supply networks has important implications for the cargo, transport, and logistics sector, starting with how they are managed. Companies will need to remove traditional, static barriers and embrace the network's chaotic, dynamic nature; more like a hive than a production line, the supply network's activity ebbs and flows in response to each day's demands. Integrated operations planning and execution will be vital, requiring constant communication with suppliers, transport partners, and customers across the network. Rather than focusing on controlling and containing costs, transport companies will need to concentrate more on how to operate their investments as profitably as possible. And they will need to invest more in visibility and mapping to better understand the players in the supply network, including sub-tier suppliers. There's certainly room for improvement in this regard: a 2017 report by Geodis found that only 6 percent of companies surveyed felt they had complete visibility into their supply chains.¹⁴

At least at the outset, the shift to supply networks will likely heighten capacity constraints as demand for warehouse space rises at the same time warehouses may be cutting back on staff and operating hours to weather the economic slump caused by COVID-19. As well, cancellations and other disruptions may interfere with schedule reliability, meaning transport and logistics companies will need to factor this into their planning and ensure they have back-up plans in place.

3. Local and regional supply networks attract more interest

COVID-19-related disruptions of global supply chains have prompted companies and governments alike to rethink their assumptions about their ability to source, secure, and ship any product from far-flung suppliers and instead source products closer to home if possible. No supply chain is immune to this risk; Alberta's Calgary Zoo has recently faced a significant challenge in obtaining the fresh bamboo it needs to feed its two giant pandas as the pandemic response interrupted normal supply chains. The zoo therefore had to find a local supplier of bamboo, which it did.¹⁵ The coronavirus crisis isn't the only factor driving the trend toward using local sources of supply. Trade agreements, evolving global regulations, and geopolitical shifts have also contributed to rising on-shoring or near-shoring, and countries are increasingly looking at building "patriotic" supply networks for critical products. Visibility across the entire, end-to-end supply network is essential for enabling organizations to identify network vulnerabilities and build geographic resilience into the network. The shift to more local, national, or regional supply networks will

add complexity and cost for the cargo transport sector. As the number of supply hubs or locations rises, supply network efficiency will fall and costs will rise as more ground will often need to be covered to fulfill orders. Companies will have to right-size their fleets to suit an environment of small, more frequent trips and less order consolidation.

4. Digitization: critical for peak network operation

As global supply chains evolve into local, national, regional—or still global—supply networks, digital technologies will play an increasingly critical role in helping the transport and logistics companies navigate these complex new ecosystems. During the early days of the COVID-19 crisis, businesses that had invested in digital supply chain mapping systems were better positioned to make strategic, pre-emptive decisions because they were better equipped to identify which locations, suppliers, or even parts were at most risk. By using sensors, scanners, Internet of Things-connected devices, 5G mobile technology, satellite communications, and edge and cloud computing, transport and logistics companies and their

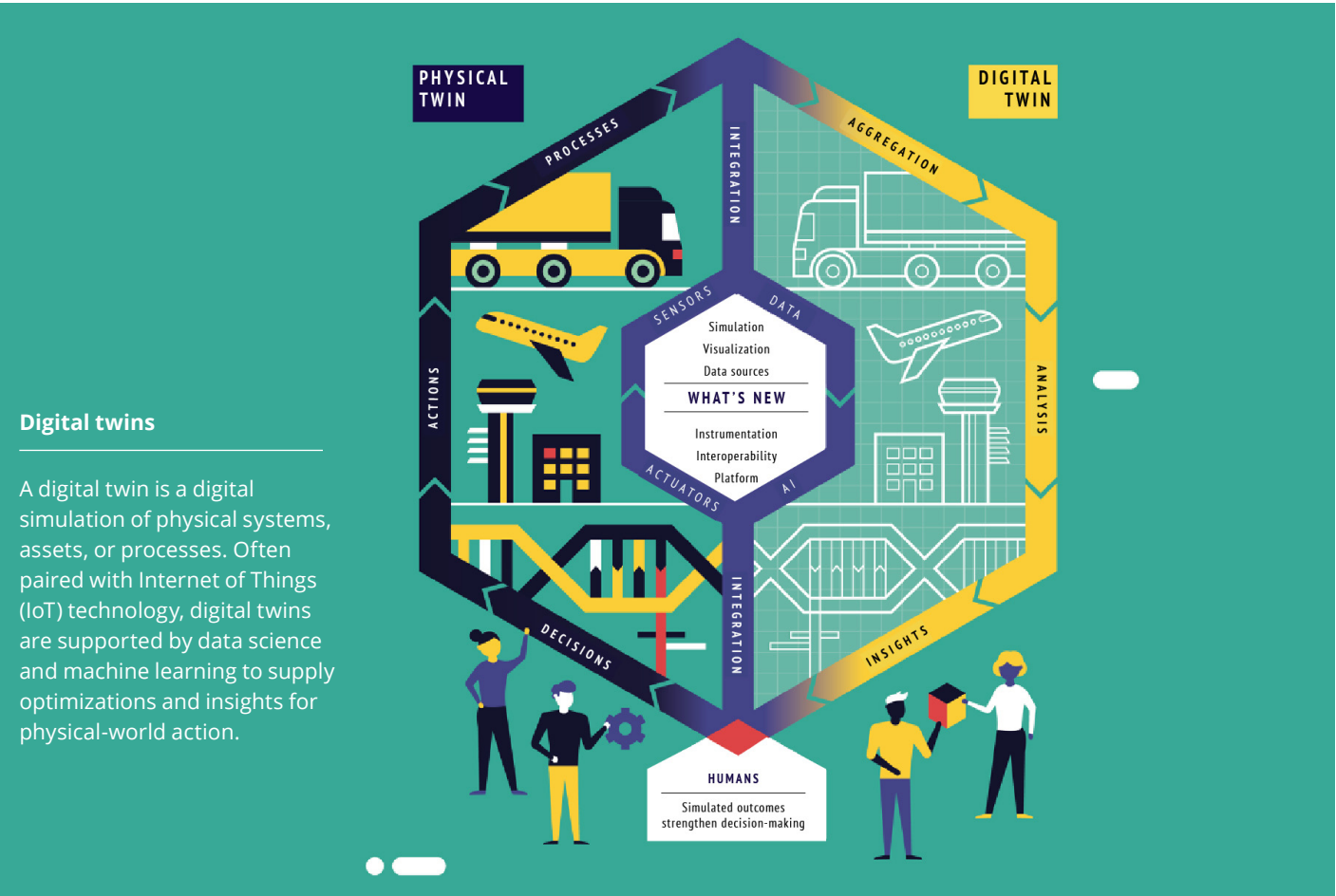
customers can achieve real-time visibility across the supply network. This facilitates resiliency across the network without requiring organizations to tie up resources keeping inventory at hand, "just-in-case" capacity on standby, or other physical buffers. Beyond this, organizations can deploy advanced analytics, artificial intelligence, and machine learning to look forward, test scenarios, and predict and resolve complex supply network challenges before they occur.

For cargo, transport, and logistics companies, further investment in digital technologies will be essential to ensure they and their supply networks operate at peak efficiency. Companies should invest significantly in integrated technologies that enhance information collection, analysis, and sharing. These can be traditional systems—enterprise resource planning (ERP), transportation management systems (TMS), and warehouse management systems (WMS)—as well as new analytic and visibility platforms. The key is to integrate these systems with suppliers, partners, and customers to the fullest extent possible. Acquiring the capability to perform scenario-planning and predictive analytics is highly recommended. [Digital twin technology](#) can help organizations manage the complexity of supply networks, track and monitor shipments and assets, and model the impact of changes in real time, which in turn allows companies to identify and mitigate potential problems before they happen in the real world.

The move toward more automation was already well underway before the pandemic hit, of course. In late 2018, for example, UPS announced plans to build a massive facility in Caledon, Ontario, to serve the Greater Toronto Area; the 850,000-square-foot facility will be fully automated and sort up to 35,000 packages per hour.¹⁷ While not every cargo transport company is willing or able to invest in automation on the scale of UPS's new Caledon facility, each organization should explore how it could be harnessed to improve efficiency and resiliency across its operations. Are there processes that can be automated? Is there an opportunity to introduce robots or cobots into warehouses? Are drones a viable alternative for some delivery situations?

5. Automation increases to control costs and improve productivity

To control costs and boost productivity while supply networks grow increasingly complex, the cargo, transport, and logistics sector will see increasing investment in automation technologies. Automation is also seen as a way to keep supplies of commodities, consumer goods, and essential products flowing at a time when a coronavirus outbreak could suddenly sweep through a human workforce. In some cases, automation can be deployed to replace human labour entirely, through the use of robots, autonomous vehicles, and drones. In other situations, automation technologies can be used to enhance human performance, whether with virtual or augmented reality (VR/AR) tools or robotic process automation. Some organizations, especially those involved in e-commerce fulfillment and distribution, are turning to collaborative robots, or cobots, to improve warehouse efficiency and bridge labour gaps. These cobots work with a human worker to help the worker complete his or her tasks; for example, a robot pallet jack that follows a worker around a warehouse.¹⁶



Orchestrating networks in the next normal

The recovery from the COVID-19 crisis will be challenging. Companies will face ongoing uncertainty and concerns over the health and safety of their employees and customers. Global supply chains and newer, nearer supply networks will take time to restart in an environment marked by supply-side disruptions and demand-side shocks.

Transport and logistics companies will need to be nimbler and more flexible to navigate new practices, processes, and approaches as they help companies get products to end consumers. The top-down control approaches that may have been feasible in the pre-pandemic era are poorly suited to the challenges of the recovery and the next normal. Instead of aiming for rigid control over their supply chains, companies will instead need to fluently orchestrate the many moving parts of their supply networks across functions and enterprises alike. How can they move from control to orchestration?¹⁸ Monitoring demand signals, improving the ability to respond to supply and demand volatility, and establishing a “control tower” to keep watch over it all will be key.

Identify demand signals to help sense and react to the market

The current crisis will eventually pass, though it is unlikely to do so uniformly around the world. Resilient organizations will need to plan for and manage through the recovery and beyond by paying close attention to market signals and identifying and monitoring leading indicators. Consumer sentiment, retail sales, commodity futures, and purchasing managers' indexes are trusted indicators; companies should also look to customer sentiment, supplier feedback, freight indexes, manufacturing capacity and more to gain insights into what the future may hold, and then plan accordingly.

Enhance dynamic inventory deployment capabilities

Traditionally, customers have been served from a main distribution centre, with inventory levels determined based on historical demand. Today, however, both supply and demand are highly volatile, and inventory imbalances are likely—which means transport and logistics company need to adjust their operations to respond quickly and efficiently when goods must be sourced from new locations.

Establish control towers to enhance visibility

Visibility, as we've noted, will be critical to managing through the recovery and beyond. It will ensure cargo, transport, and logistics companies have the timely, high-quality information needed to make decisions with confidence.

Organizations should consider implementing control towers that, like their air traffic control namesakes, provide right-time data visibility, alerts, prescriptive insights, and self-driving execution. World-class control towers will be enabled by artificial intelligence, machine learning, and advanced analytics, and they will be integrated into key business processes. Examples include:

- **Supply network risk control tower:** identifies suppliers or commodities that pose elevated risk across the supply network, and enables companies to visualize key performance indicators, bottlenecks, and dips in performance.
- **Logistics control tower:** delivers visibility into inventory levels and the overall state of the logistics network, including backlogs, anticipated delays due to port or border issues, and capacity constraints. This visibility allows organizations to streamline material flows and improve customer service.
- **Customer service control tower:** offers real-time visibility into the status of customer order fulfillment and opportunities to improve service levels. It also enables more effective communication with customers regarding product availability and delivery timing.

Five key takeaways

1. **Be a partner, not a commodity.** Dealing with the impact of COVID-19 is highly challenging for both customers and customers' customers. This is the time for transport and logistics companies to position themselves as true business partners, not just a service provider moving goods from point A to point B. Organizations should integrate their operations with those of their customers and provide solutions in keeping with the supply chain shifts that are underway.
2. **Develop the capability to flex and scale up—and down—profitably.** The global economy faces a winding road to recovery while COVID-19 remains an ongoing concern, and the world's supply chains and networks will be in a state of flux for some time as a result. Companies across the cargo transport sector will need to develop and sharpen their ability to respond nimbly to fluctuating needs, scaling up quickly when needed but also being able to operate profitably during leaner times, until the global economy settles into a more stable normal.
3. **Embrace transparency. Visibility goes both ways.** To be an effective partner to customers and to earn their trust, transport and logistics companies will need to expose their operations and inner workings to a much greater extent. They will need to be open and honest about pricing, performance, operational challenges, and more if supply networks are to function as effectively as possible in these unusual times.
4. **Move to support shorter, more complex supply networks.** Cargo companies will need to refocus their capital investments to reflect the shift from linear global supply chains to shorter, more complex supply networks. Fleets will need to be diversified to support, more frequent shipments. Terminal and warehouse space will need to be reconfigured to support inventory control and management—and even storage, in some cases. And driver models will need to be rethought to adapt to the needs and demands of shorter supply networks.
5. **Bring consumer thinking to B2B and B2C alike.** Transport and logistics companies should invest in digital capabilities that enhance their ability to interact with their staff and customers, whether B2B or B2C. Web-based and mobile-based self-service applications, for example, can allow customers to change pickup or delivery locations, or enable drivers to check in and take care of new pickups that spring up along their route.



A nimbler, more flexible future awaits

Transport and logistics companies may have been able to weather much of the impact of the COVID-19 crisis, but the pandemic is certain to leave a lasting mark on the sector. As they turn their attention to the uncertainties and opportunities of what seems sure to be a long and winding road to recovery, these companies will need to adapt and evolve to deal with the changes wrought by the experience.

Consumers' use of e-commerce and their delivery expectations will continue to rise. Many of the linear global supply chains that have predominated in recent memory will transform into shorter, more complex supply networks that demand much more flexible and agile operations from companies that move goods through them. And control will give way to orchestration, as companies use their visibility into the supply network and digitally driven insights to respond nimbly to their ever-changing environment.



Endnotes

1. World Trade Organization, "Trade set to plunge as COVID-19 pandemic upends global economy", https://www.wto.org/english/news_e/pres20_e/pr855_e.htm.
2. Based on data for 100 US and Canadian transportation companies (trucking, air freight railroad, marine). Source: Capital IQ, World Bank, IMF, Deloitte analysis.
3. Source: Statistics Canada GDP data, World Trade Organization forecasts.
4. Deloitte, State of the Consumer Tracker, August 8, 2020 data, <https://www2.deloitte.com/us/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html>.
5. Deloitte, State of the Consumer Tracker, August 8, 2020 data, <https://www2.deloitte.com/us/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html>.
6. Melody McKinnon, "2019 Multi-Source Report: What Canadian Online Shoppers Want", Online Business Canada, <https://canadiansinternet.com/2019-report-what-canadian-online-shoppers-want/>.
7. Tara Deschamps, "'2030 overnight': Shopify offers help to firms grappling with COVID-19", BNNBloomberg.ca, <https://www.bnnbloomberg.ca/2030-overnight-shopify-offers-help-to-firms-grappling-with-covid-19-1.1438934>.
8. Susan Krashinsky Robinson, "Sobeys launched e-commerce amid surge in demand due to COVID-19", The Globe and Mail, <https://www.theglobeandmail.com/business/article-sobeys-launches-e-commerce-amid-surge-in-demand-due-to-covid-19/>.
9. Deloitte, "The last-mile challenge in Canada: It's time to jumpstart the evolution of the delivery ecosystem", <https://www2.deloitte.com/content/dam/Deloitte/ca/Documents/consumer-industrial-products/ca-final-mile-challengesin-canada-report-2-aoda-en.pdf>.
10. Shefali Kapadia, "Walmart adds 2-hour delivery service", Supplychaindive.com, <https://www.supplychaindive.com/news/walmart-2-hour-delivery-last-mile/577183/>.
11. Truckinginfo.com, "Tech Startups Match Retailers, Final-Mile Drivers", <https://www.truckinginfo.com/354607/tech-startups-match-retailers-final-mile-drivers>.
12. Ibid.
13. Inside Logistics, "Island-based Ontario First Nation to get drone deliveries", <https://www.insidelogistics.ca/charity/island-based-ontario-first-nation-to-get-drone-deliveries-171676/>.
14. Kate Patrick Macri, "Only 6% of companies believe they've achieved full supply chain visibility." Supplychaindive.com, <https://www.supplychaindive.com/news/supply-chain-visibility-failure-survey-geodis/517751/>.
15. David Agren, "Coronavirus could starve Canada zoo's pandas as bamboo supply chain snaps", The Guardian, <https://www.theguardian.com/world/2020/aug/05/canada-pandas-zoo-bamboo-coronavirus>.
16. Jen Miller, "How cobots are changing the nature of fulfillment." Supplychaindive.com. <https://www.supplychaindive.com/news/cobots-change-fulfillment-warehouse/562614/>.
17. Truck News, "UPS to build largest Canadian facility in Caledon" <https://www.trucknews.com/transportation/ups-to-build-largest-canadian-facility-in-caledon/1003088640/>.
18. See Deloitte's COVID-19: Orchestrating the recovery of organizations and supply chains for more on this topic. <https://www2.deloitte.com/ca/en/pages/finance/articles/covid-19-orchestrating-recovery-of-organizations-supply-chains.html>.

Contacts

Yvonne Rene de Cotret

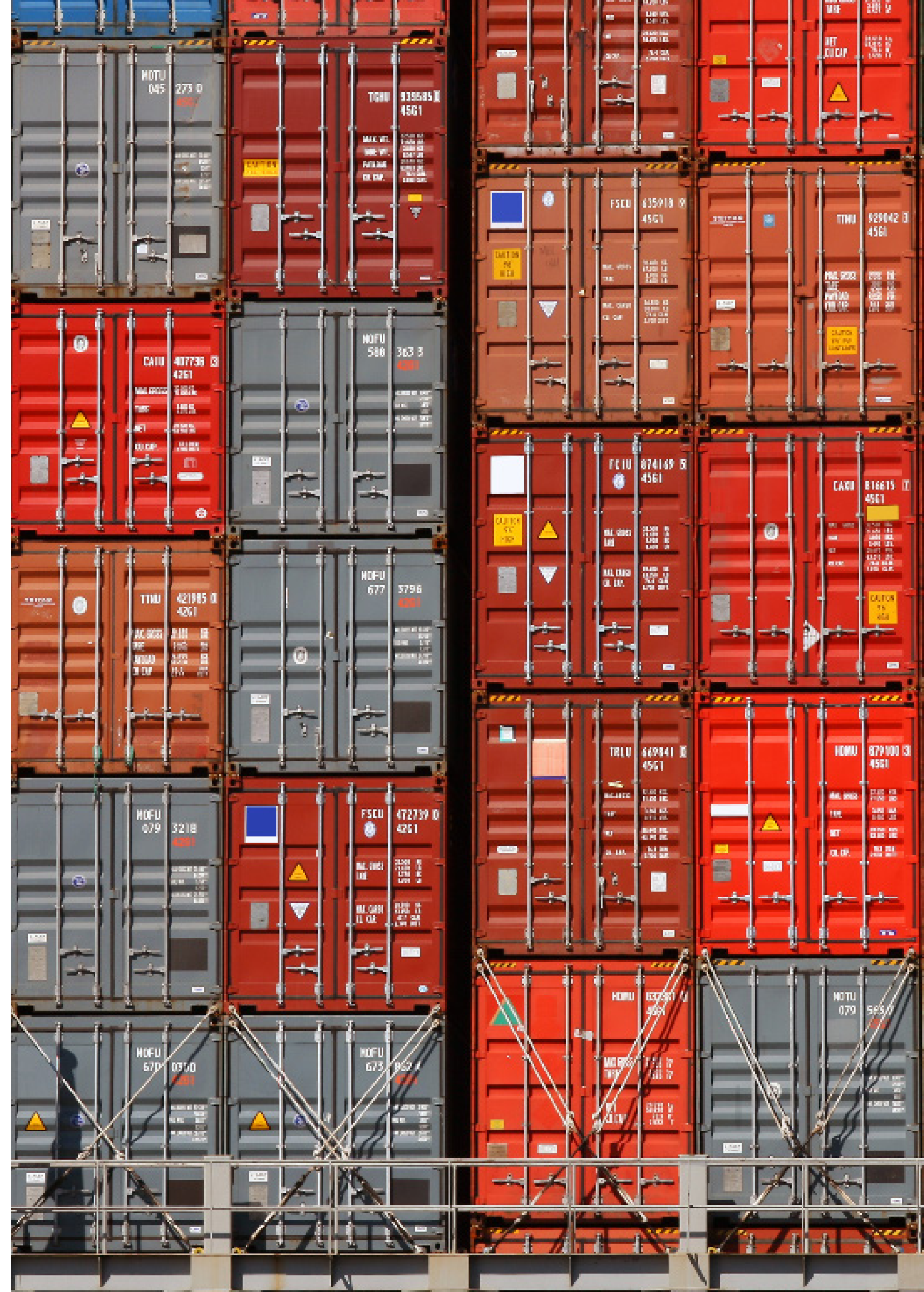
National Leader, Transport and Future of mobility

yrenedecotret@deloitte.ca

Ryan Ernst

National Leader, Goods Movement, Supply Chain Operations

rernst@deloitte.ca





About Deloitte

Deloitte provides audit and assurance, consulting, financial advisory, risk advisory, tax, and related services to public and private clients spanning multiple industries. Deloitte serves four out of five Fortune Global 500® companies through a globally connected network of member firms in more than 150 countries and territories bringing world-class capabilities, insights, and service to address clients' most complex business challenges. Deloitte LLP, an Ontario limited liability partnership, is the Canadian member firm of Deloitte Touche Tohmatsu Limited. Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee, and its network of member firms, each of which is a legally separate and independent entity. Please see www.deloitte.com/about for a detailed description of the legal structure of Deloitte Touche Tohmatsu Limited and its member firms.

Our global Purpose is making an impact that matters. At Deloitte Canada, that translates into building a better future by accelerating and expanding access to knowledge. We believe we can achieve this Purpose by living our shared values to lead the way, serve with integrity, take care of each other, foster inclusion, and collaborate for measurable impact.

To learn more about Deloitte's approximately 312,000 professionals, over 12,000 of whom are part of the Canadian firm, please connect with us on LinkedIn, Twitter, Instagram, or Facebook.

© Deloitte LLP and affiliated entities.

Designed and Created by Core Creative Services RITM0545583