Adapting your Canadian supply chain for e-commerce efficiency
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Online shopping was slow to catch on in Canada, but once it took hold, it never let go. Canadian consumers spend an average 41.3 hours per month perusing the Internet and, during 2014, spent more than C$22.3 billion on online purchases. This figure is expected to continue at a strong rate of growth, with double-digit annual rates of increase projected at least through 2017.

This strong affinity for web-based retail has had a transformative effect on Canadian businesses, many of which were slow to offer online buying options or, in the case of those that did, failed to retool their supply chains to fulfill e-commerce customer orders. In many instances, orders arrived from consumers located hundreds of miles from the nearest retail store, and retailers did not have adequate fulfillment processes in place.

“More than 10% of our business is now generated from e-commerce sales,” said Godwin Kruitwagen, director of supply chain & logistics for apparel retailer Comark, during a panel discussion about the impact of e-commerce on Canadian businesses’ supply chains. “With so much potential for e-commerce growth, the question becomes, ‘How does that fit into the supply chain you already have? What do you need to do differently?’

“For us,” he added, “the challenge has been to reset the supply chain to make it work within the consumer-driven world of e-commerce.”

Businesses dipping into the world of e-commerce quickly learn that online customers have high expectations. Products are expected to be in stock and easily accessible, delivery times must be guaranteed and reasonable, products must arrive in quality packaging, and shipping charges should be as close to free as possible. As well, returns should be easy and convenient. And for shipments that must cross an international border? Consumers have little tolerance for customs-related delays or unexpected invoices to cover duties or associated clearance costs.

Entering the e-commerce world is a huge decision that requires significant planning and complete buy-in from management. Few businesses have the internal resources or capability to plan, execute and manage an e-commerce division. Instead, most enlist the services of an experienced third-party logistics provider (3PL). An experienced 3PL will offer a customized solution that meets a business’s specific needs, offers customers efficient shopping and delivery experiences and disentangles business managers from the process so they can focus on core business objectives.

Sushil Arora, chief operating officer of Vancouver-based Danica, a manufacturer of kitchen and home decor products, expressed sentiments shared by many managers: “E-commerce is definitely the future, and our challenge is to make sure we get a share of the pie. But shipping to the consumer is a different animal (than traditional retail fulfilment), and finding the right partner has been vitally important.”

The following discussion will offer insight into the key challenges of adapting an existing supply chain for e-commerce success. And as the discussion will make clear, a trusted, reliable logistics partner will be an integral part of building that supply chain.
Adapting your Canadian supply chain for e-commerce efficiency

Canadian e-commerce on track for explosive growth

According to analysis by Statistics Canada, e-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade. Online sales account for 6% of total Canadian retail spending. By comparison, U.S. online sales account for 9% of total spending.

Forrester analyst Peter Sheldon attributed Canadians’ online spending increase to three recent developments:

1. The increased number of Canadian retailers that have expanded beyond brick-and-mortar capability
2. The increased number of U.S. retailers that have improved their accessibility to the Canadian market
3. Canadian consumers’ increasing comfort with online shopping

Despite this surge in e-commerce, Canadian shoppers have expressed concern about their online experiences. Forrester’s “2013 State of Canadian Online Retail” survey noted the following areas of dissatisfaction:

- **High shipping costs:** 68% of respondents cited shipping costs as a top concern when shopping online.
- **Unsatisfactory product selections:** 37% of online shoppers said they are unable to find the products they want on Canadian websites. As a result, 32% said they end up purchasing from U.S. or other international sites and incurring higher shipping costs, customs duties and other clearance-related fees.
- **Prices are not competitive:** More than 62% of survey respondents cited price as their top consideration in making an online purchase, with most indicating a willingness to shop with non-Canadian retailers if the price was better.
- **Lack of omni-channel options:** Canadian shoppers indicated that retailers are lacking in “basic” omni-channel capabilities. For example, 65% want to be able to return an online purchase to a brick-and-mortar store, while 61% want to be able to view in-store inventory online.

The 2013 survey, which was conducted in conjunction with Canada Post and Shop.ca, offered a few words of caution to Canadian online retailers:

Some retailers like BestBuy, Wal-Mart and Amazon already offer mature Canadian-centric online shopping experiences, but many Canadian merchants still fail to deliver the basics. These merchants need to smarten up; U.S. retail powerhouses...are not only opening physical stores in Canada but also have the means and, more importantly, the know-how to satisfy Canadian online shoppers.

The State Of Canadian Online Retail 2013, Peter Sheldon April 2013 Blog, Forrester Research, Inc.
Canadian e-commerce on track for explosive growth

In other words, Canadian businesses run the risk of missing out on tremendous e-commerce opportunities if they fail to make the necessary adjustments to offer a high-quality online experience to their customers.

B2B transactions compose bulk of online spending
While business-to-consumer (B2C) online sales seem to garner the most attention, many are surprised to learn that, in terms of expenditure, business-to-business (B2B) transactions account for more than twice the amount of B2C purchases. In the U.S., for example, B2B online sales were US$559 billion during 2013 versus B2C sales of US$252 billion. On a global basis, B2B e-commerce is expected to surpass $6.7 trillion by 2020.

The reality of B2B e-commerce is causing many businesses to retool their marketing and “outreach” efforts. Many companies are redesigning their websites and mobile retail capabilities to provide B2B shoppers with retail experiences that more closely resemble B2C transactions. The surge in e-commerce has also caused businesses to make fundamental changes to supply chain processes.

A recent analysis in Forbes pointed out some of the key differences between B2B and B2C e-commerce:

In B2C, sales are relatively simple. Prices are fixed, quantities are low, and shipping is easy. Very little regulation or tax complexity comes into play, and products are easy to showcase and market. In the contrasting B2B setting, prices are highly variable. Similarly, volumes are much higher, but also of a much wider range, necessitating a flexible shipping and logistics solution.

The analysis concludes that for these reasons, B2B e-commerce is fundamentally more difficult to execute, highlighting the importance of having a strategically sound supply chain in place.
The surge in e-commerce has created tremendous opportunities for Canadian manufacturers. But much planning, analysis and reordering of existing practices must occur before those opportunities can be realized. A business cannot simply absorb an e-commerce ordering and fulfilment process into an existing supply chain. Nor can a business adopt a single solution to handle both B2B and B2C e-commerce sales.

Instead, a business must invest the time to do a thorough analysis of its current business objectives and future plans and weigh those against its existing supply chain. From there, all holes, inefficiencies and weak links must be addressed. Among the major areas to consider are these:

**Need for automation/technology in supply chain**

While it is well-known that technology has been a game changer in improving supply chain processes, it is somewhat surprising to learn that many businesses have yet to incorporate technology into their daily operations. Research by technology advisory firm Software Advice found that when it comes to managing warehouse operations, 35% of businesses surveyed were still using manual methods, including pen-and-paper spreadsheets and Excel documents.

“Our system is very simple,” said Comark’s Kruitwagen in discussing his company’s new direct-to-store model, which allows for centralized processing of warehousing and distribution for Comark’s three retail banners: Ricki’s, Cleo and Bootlegger. “We use basic software to create fairly easy spreadsheets, which we send to our 3PL. Our 3PL then converts our data into a format it can use.”

Comark is among many Canadian companies that rely on a 3PL to ensure a technology-dependent supply chain solution. As businesses look to adapt their supply chains to accommodate e-commerce components, technology will play an increasingly vital role.

Among other things, businesses will benefit from what Forbes described as being able to “differentiate themselves by creating a unique customer journey, connecting their off-line brick-and-mortar stores or disjointed sales force with an integrated online journey.”

This has been the experience of home decor manufacturer Danica, where technology has allowed the company to establish and manage key performance indicators in several critical areas. “We have 4,000 SKUs in our inventory and more than 1.5 million picks each year,” said COO Arora. “Technology has allowed us to improve how we operate and minimize chances of mistakes happening. But more important, by paying close attention to our KPIs, we can become better and ensure that we are performing at superior levels in all areas.”

**Supply chain visibility**

Technology is also critical to adding visibility to a multi-faceted supply chain. Gaining visibility means allowing different parts of the process to talk to one another so they understand each other’s role in the supply chain and can get to the point where everyone is on the same page, pulling in the same direction.

The obvious and immediate benefit of supply chain visibility comes when a manager is able to know, with pinpoint precision, the exact location of any raw material or finished product at any given time or when a manufacturer is able to continue to function even after a significant weather event, or another type of disruption, interrupts production in one geographic region.

**Supplier visibility**

### Enhanced visibility

Tier 1 supplier visibility and some Tier 2 supplier visibility

### Some visibility

Limited Tier 1 supplier visibility but not Tier 2 and beyond

Source: KPMG Canadian Manufacturing Outlook 2014.
Building your best supply chain

Canadian businesses clearly understand the importance of having visibility throughout their supply chains. According to KPMG’s “Canadian Manufacturing Outlook 2014,” fully 65% of Canadian manufacturers indicate they have at least some degree of visibility, with 9% saying they have “complete visibility” into their Tier 1 and Tier 2 suppliers.

Among the benefits Canadian manufacturers derive from having visibility into their supply chains are the following:

- 28% Better managed costs
- 22% Better managed supply chain risk
- 11% Capability to expand into new products and services

It’s important to note that visibility to one company is not necessarily visibility to another. Businesses need to begin the process of improving visibility by determining what exactly they hope to achieve and how committed they are to opening up their processes to allow information exchanges among all key stakeholders.

Distribution/warehousing issues

A fundamental issue for any business is ensuring that the right amount of inventory is located in the right place at the right time. In a country as geographically vast as Canada, that is no small undertaking.

A. Regional/multi-location warehouses

Businesses must contend with inventory management issues that arise when consumers are located hundreds, sometimes thousands, of kilometres from a warehouse or brick-and-mortar store. Consider the experience of “European Comfort Shoe” manufacturer Josef Seibel, whose Canadian operations are based in British Columbia. The company operates five factories in Eastern Europe and outsources a significant amount of production to Asia. According to Ken Hembroff, managing director of transportation and logistics, “just moving product in a timely fashion is one of the biggest logistics issues we have.”

The company’s fortunes brightened considerably when it signed an agreement with Costco to provide a unique line of shoes for a series of regional “road shows” conducted at Costco outlets across Canada. They run road shows in the spring and again in the fall. “In some cases, we run 12 events simultaneously and have to ship replenishment orders every day to meet our obligation to maintain full inventories,” Hembroff noted. “Our biggest challenge was to ensure that products could be readily available to support our events in Eastern Canada.”

Seibel’s solution was to partner with a 3PL with an extensive distribution network throughout Canada that included geographically desirable warehouses. Seibel has improved transit times to Eastern Canada and said it would “never” have been able to meet its inventory demands without this solution.

Ensuring products are in stock and available to ship to consumers, regardless of their geographic location, is a problem shared by most Canadian e-commerce retailers. How can you ensure that inventory will be sufficient to meet consumer demand in both Western and Eastern Canada? Seibel was able to solve this problem by turning to its 3PL for a warehouse solution — an option that may also be effective for e-commerce retailers.

B. Distribution centre bypass

For apparel retailer Comark, inventory typically followed a somewhat circuitous and rigid route. Products would be manufactured in Asia and then arrive in Canada via Vancouver. Upon arrival, all inventory would then be transported to a distribution centre located near Montreal. Once at the DC, products to be sold in stores located in Western Canada would be transported back to their final destination — a tremendous waste of time and money.

Fortunately, better thinking and technology have prevailed. Many logistics providers are now able to offer a “distribution centre bypass” solution, which allows shipments to travel directly to their end destination. For Comark, this means its 3PL is able to label, process and ship products headed for Western Canada from its own warehouse, eliminating the unnecessary trip to Montreal. DC bypass has shaved days off Comark’s transit times and has had a measurable impact on efficiency and speed to market. The DC bypass solution has also had an environmental impact: Travel has been reduced by 11% per store, per shipment, resulting in a reduction in CO2 emissions of an estimated 2,440 tonnes, or 30%.

Further, Comark is now able to enjoy synchronized ship dates, whereby all stores receive shipments on the same day, something that was not possible using the previous shipping scenario.

The DC bypass solution can also be extremely helpful for e-commerce retailers who face the challenge of meeting consumers’ expectations of being able to pick up their online purchases in a local retail outlet. DC bypass helps ensure that inventory moves quickly to where it needs to be rather than sitting idle in a remote distribution centre.
Building your best supply chain

Meeting customer expectations

As businesses navigate the changes necessary to improve supply chain efficiency, customer satisfaction will be at the forefront of all decision-making processes. Businesses making the transformation from brick-and-mortar retail to online sales learn quickly that customers have very high expectations and will vote with their pocketbook if those expectations are not met.

Research by comScore into Canadian consumers’ online shopping preferences found very definitive likes and dislikes that affect behaviour. When asked what a retailer should offer in order to garner a positive word-of-mouth referral from them, shoppers very much favoured sites that offered a hassle-free, cost-efficient experience:

Drivers of positive recommendations (n=1,031)

<table>
<thead>
<tr>
<th>Driver</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Free shipping</td>
<td>65%</td>
</tr>
<tr>
<td>Receiving my product when expected</td>
<td>53%</td>
</tr>
<tr>
<td>Easy returns and exchanges</td>
<td>36%</td>
</tr>
<tr>
<td>Free returns</td>
<td>35%</td>
</tr>
<tr>
<td>Tracking services</td>
<td>34%</td>
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</tbody>
</table>

Almost 70% of respondents have recommended an online retailer to others. Source: comScore 2013.

And when asked about attributes that would make them more likely to shop with a particular retailer, shoppers showed a strong preference for omni-channel options:

Drivers of negative recommendations (n=1,031)

<table>
<thead>
<tr>
<th>Driver</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping costs too high based on product price</td>
<td>69%</td>
</tr>
<tr>
<td>Shipping costs too high based on expected delivery date</td>
<td>54%</td>
</tr>
<tr>
<td>Products arrived damaged due to shipping packaging</td>
<td>50%</td>
</tr>
<tr>
<td>The delivery took longer than I was told</td>
<td>50%</td>
</tr>
<tr>
<td>I could not get a refund only credit</td>
<td>49%</td>
</tr>
<tr>
<td>Bombarded with email offers I didn’t want</td>
<td>43%</td>
</tr>
<tr>
<td>Could not find a phone number to contact customer service</td>
<td>40%</td>
</tr>
<tr>
<td>Difficulty getting a replacement package because I am not home to sign for it</td>
<td>40%</td>
</tr>
<tr>
<td>Getting a refund/credit took too long</td>
<td>39%</td>
</tr>
<tr>
<td>Unreliable shipping made it hard to anticipate delivery dates</td>
<td>38%</td>
</tr>
<tr>
<td>Dealing with the retailer on returns was too cumbersome</td>
<td>37%</td>
</tr>
<tr>
<td>Check-out process was way too long</td>
<td>26%</td>
</tr>
</tbody>
</table>

Source: comScore 2013.

“Almost 70% of respondents have recommended an online retailer to others.”

Canadian consumers also have strong thoughts about what they dislike about online retail experiences:

“We learned quickly that the customer wants the same experience whether it’s in the store or online,” said Comark’s Kruitwagen. “The service provided in the store is the same expected while shopping at home.”

Kruitwagen explains that his company tried different ways to add value to online transactions, including by adding gift wrap to packaging and including a gift with purchase (GWP). “But at the end of the day, it didn’t matter. Our customers were most interested in receiving their quality merchandise as quickly and cost-effectively as possible.”
Building your best supply chain

Improving speed to market

If you were to ask 10 manufacturers if they were satisfied with their products’ speed to market, chances are all 10 would say there is room for improvement. Speed to market is a vitally important factor in today’s hyper-competitive market, and few industries are immune to the need to have their products available as quickly as possible. Speed to market is especially important in the highly consumer-driven world of e-commerce, in which consumers have high expectations for fast, seamless delivery and will not hesitate to move to a competitor if those expectations are not met.

In its 2014 report on Canadian manufacturing, KPMG cited increasing speed to market and R&D investment as “key opportunities” for Canadian manufacturers. “As the global economy rebounds,” the report stated, “Canadian companies have the opportunity to respond to the growing demand among their customer base for more and better products delivered faster, and gain competitive advantage by investing in R&D and increasing speed to market.”

Having worked hard in recent years to improve speed-to-market capabilities, many 3PLs can now offer streamlined logistics solutions that shave days off previous distribution plans. But a business needs to do its homework and question a 3PL’s performance and capabilities.

Returns management

Businesses that sell directly to consumers are increasingly aware that an estimated 8.6% of sales will come back in the form of returns – 80% of which will not be damaged or in any way defective. That rate of return increases dramatically for e-commerce purchases. Businesses are realizing the potential windfall that could materialize from a well-managed returns policy, in terms of both recapturing revenue and generating goodwill among consumers.

Businesses that sell directly to consumers tend to prioritize returns policies in terms of ease and flexibility for the consumer, with great emphasis placed on making the returns experience a positive one. And it’s no wonder, with 85% of consumers responding in a recent survey that they would not continue to purchase from a retailer with an inconvenient returns policy.

In an example that mirrors closely the experiences of most e-commerce retailers, Josef Seibel realized soon after beginning its partnership with Costco that it would need to adapt to Costco’s consumer-friendly returns policy. Consumers would bring their Seibel shoes back with strong expectations for a hassle-free returns experience.

Seibel turned to its 3PL, which was able to offer a customized solution to address its returns issue. The 3PL established a schedule for collecting all returns and set aside a dedicated returns processing centre. Upon arrival at the processing centre, each pair of shoes is examined by 3PL employees. Defective footwear is sent to Seibel’s warehouse, and non-defective shoes are cleaned and returned to the Costco road show inventory.

Through this process, which was customized for Seibel by its 3PL, the company is able to quickly recapture value for undamaged returns. Prior to implementing this process, undamaged merchandise was caught up in a timely, expensive process, usually missing optimum selling periods at the store level.

Seibel’s returns policy is highly efficient for several reasons:

1. The reverse logistics process is kept separate from the company’s regular/outbound logistics process.
2. Seibel greatly reduced the use of internal resources to manage the process.
3. Non-defective returned merchandise is able to quickly re-enter the inventory stream.
4. The reverse logistics plan has been customized to meet Seibel’s precise needs.
5. The returns policy is very consumer friendly and consistent with Costco’s highly flexible returns allowances.

Top requirements for speed to market include:

1. Streamlined, single-source solutions in which the same 3PL handles all logistical issues
2. Dedicated personnel who understand your business and are perceived as being part of your team
3. A high degree of flexibility to adapt to changing market conditions and unanticipated challenges
4. Capability to offer innovative supply chain solutions that integrate technology and automation to improve visibility, thereby reducing risk of disruptions and improving efficiency and transit times
Whom do you trust? Choosing the right 3PL/logistics provider

For many businesses, making the decision to enlist an outside partner to manage supply chain processes represents a tremendous change in practices and culture. After all, bringing in an outside provider means having to share data and processes considered highly confidential. Plus, there is the fear of the unknown – what if the 3PL is not up to the task and ends up damaging both a company’s reputation and its relationship with customers?

In fact, a 3PL relationship can be a very rewarding partnership and can open new doors and help businesses in ways previously unthinkable. As Josef Seibel’s Ken Hembroff said, his company would not have been able to fulfill its contractual obligations to Costco without the efficiency and seamless service offered by its 3PL.

But Hembroff also said that finding the right 3PL was a process. “It was sort of like dating. We got to know each other better and built a relationship, and then the trust came.”

It’s critically important for a business to invest the time necessary to ensure it chooses a 3PL that can address its specific needs. No two supply chains are the same, and a business needs to make sure its logistics partner understands its exact needs and can provide the necessary services. A few considerations:

**Flexibility:** Can the provider offer the services that fit my specific needs, or will I be required to adjust my needs to fit what the provider can offer?

**Scope of service:** Can the provider offer comprehensive solutions for all my logistics needs, or will parts of my business be off-loaded to other vendors?

**Innovation:** Is the logistics partner willing to take the time to understand my business needs and customize a solution for me, or will I be given an “off the shelf,” take-it-or-leave-it solution?

**Customer service:** Does the provider place a high value on customer satisfaction, and will I have a person to contact should a last-minute adjustment be necessary or should a mistake or emergency arise?

Once in place, a productive 3PL relationship will result in key benefits including:

**Ability to focus on core competencies.** “Don’t be afraid to admit what you don’t know” is how Danica’s Arora describes his business’s decision to partner with a 3PL. As Arora explains, his company is in the business of designing and producing quality and innovative home decor products. It is not in the business of logistics or information technology or any number of other processes that go along with running a business. By partnering with a single-source 3PL that can seamlessly take on responsibility for these non-core areas, Arora and his employees are able to stay focused on growing their business.

**Increased efficiency.** With a 3PL in charge of all logistical and transportation issues, businesses can expect enhanced efficiency throughout the supply chain. When inventory needs arise in one part of the country, for example, a good 3PL can pull inventory from elsewhere and have it seamlessly transported to where it is needed.

**Customized troubleshooting.** “Customized troubleshooting” is the term Comark’s Kruitwagen used to describe his company’s experience. “We ask our 3PL to move product in ways that were previously unthinkable, and the answer we get back is ‘no problem,’” he explained.

**Peace of mind.** This is a benefit frequently mentioned by Canadian companies when asked about key benefits their 3PLs provide. In many instances, 3PL employees become fully integrated with the businesses they serve and are valued members of the team. “You cannot overstate the importance of having this consistency,” said Kruitwagen. “We now have the same company that comes to all our stores and delivers product. And if I ever thought of switching, I’d have a revolt from 350 of my managers.” A successful 3PL will become fully integrated with its customers – fully invested in helping those businesses succeed – and will go the extra mile to ensure that all processes function smoothly, efficiency is optimized and costs are kept in check.
One of the big surprises of the 2014 holiday shopping season was the trend among consumers away from visiting traditional brick-and-mortar stores in favour of using e-commerce venues including mobile devices and online shopping. As traffic to retail stores declined, online retailers saw what Retail Council of Canada president Diane Brisebois called “explosive growth.”

Canadian businesses are catching on to the tremendous impact e-commerce is having on consumer buying habits – both in terms of B2B and B2C transactions – and adapting their supply chains to meet the demands of e-commerce processing and fulfilment.

In doing so, an integral key to their success has been a qualified and trusted 3PL. As supply chains become increasingly complex, businesses appreciate having an experienced partner to manage their critical manufacturing, warehousing, distribution and transportation needs. Businesses can entrust these functions to an expert, thereby freeing themselves to focus on core objectives. With the right 3PL in place, Canadian businesses are finding tremendous success in e-commerce sales…and unexpected supply chain efficiencies along the way.

Conclusion

Purolator Inc. is Canada’s leading integrated freight and parcel solutions provider, with one of the nation’s most extensive transportation and logistics networks. Purolator Logistics, a service of Purolator Inc., offers businesses comprehensive solutions to improve overall supply chain efficiency and speed to market and to reduce distribution costs. Through Purolator Logistics, businesses benefit from customized solutions for all their logistics needs including importation/border clearance management, warehousing and fulfilment, transportation services and returns processing. Purolator Logistics provides one-stop solutions that ensure businesses greater flexibility, customized solutions and maximum efficiency.

Contact us at 1 855 268-8255 or email us at purologistics@purolator.com to learn more about Purolator Logistics’ supply chain optimization solutions. A Purolator customized solution will improve efficiencies and reduce costs within your current supply chain…to, from and within Canada.
References