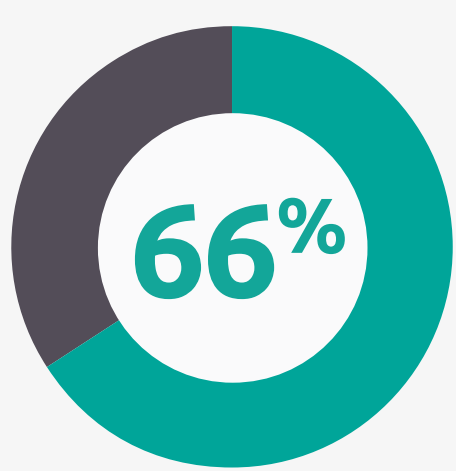


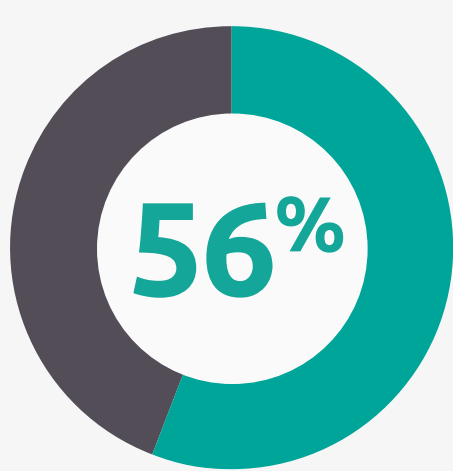
The resurgence of manufacturing

Reindustrialization strategies in Europe and the US – 2025

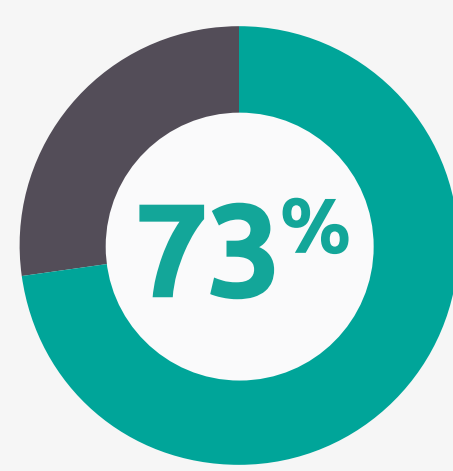
Organizations intensify their focus on reindustrialization



either already have a reindustrialization strategy or are developing one in 2025, up from 59% in 2024

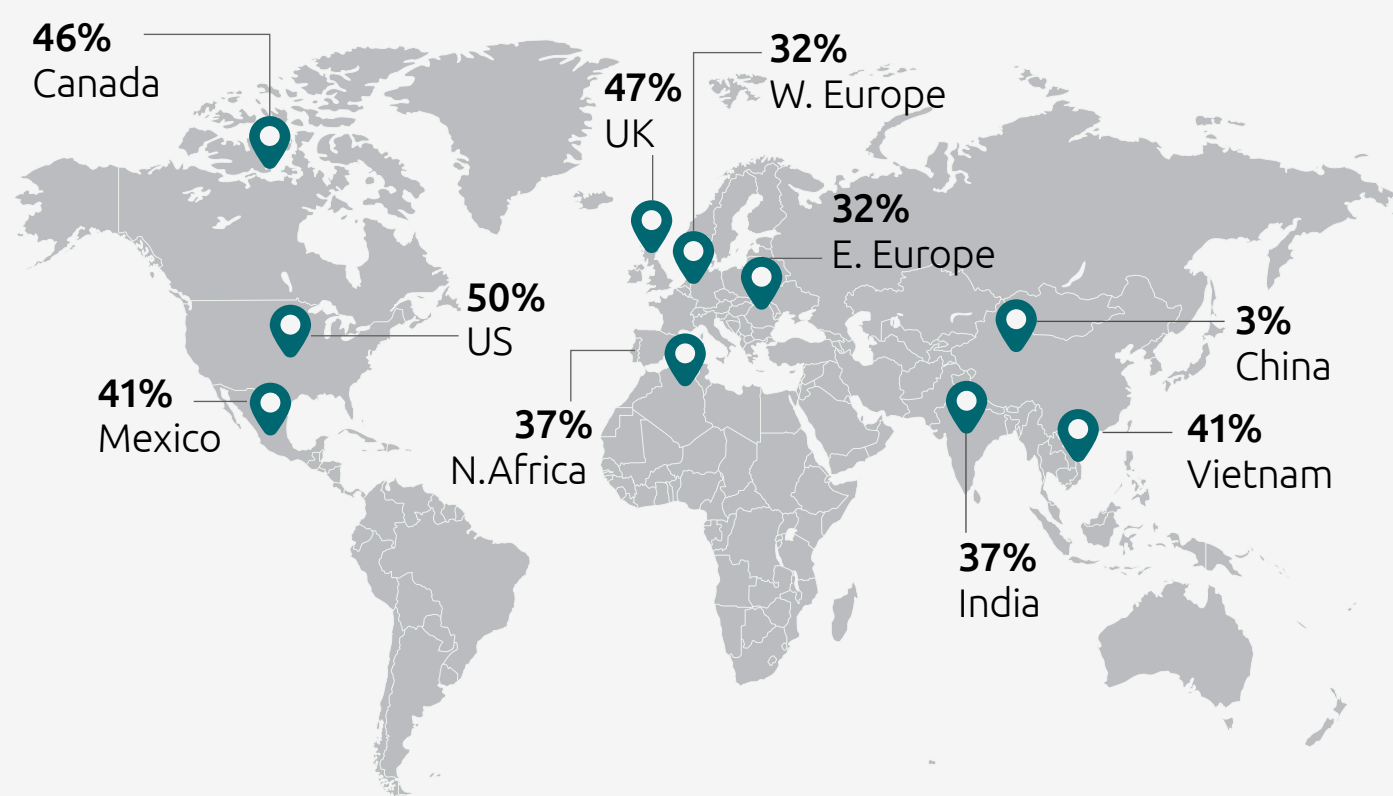


have invested in either nearshoring or a combination of reshoring and nearshoring of manufacturing in 2025, up from 42% in 2024

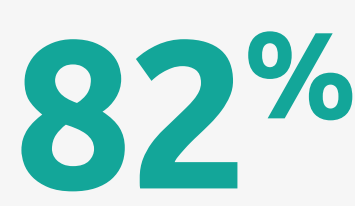


believe friendshoring will represent a significant proportion of their sourcing and production going forwards

Top destinations for reindustrialization initiatives span North America, South-east Asia, Europe and North Africa

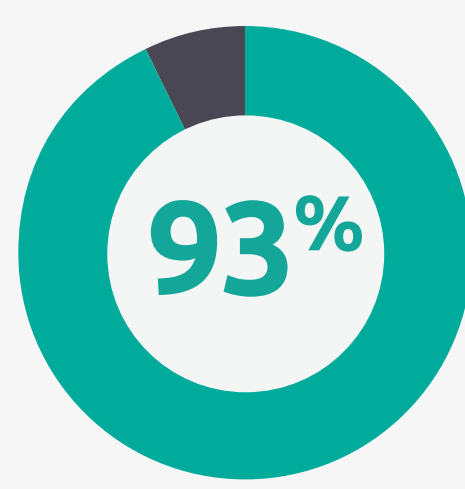
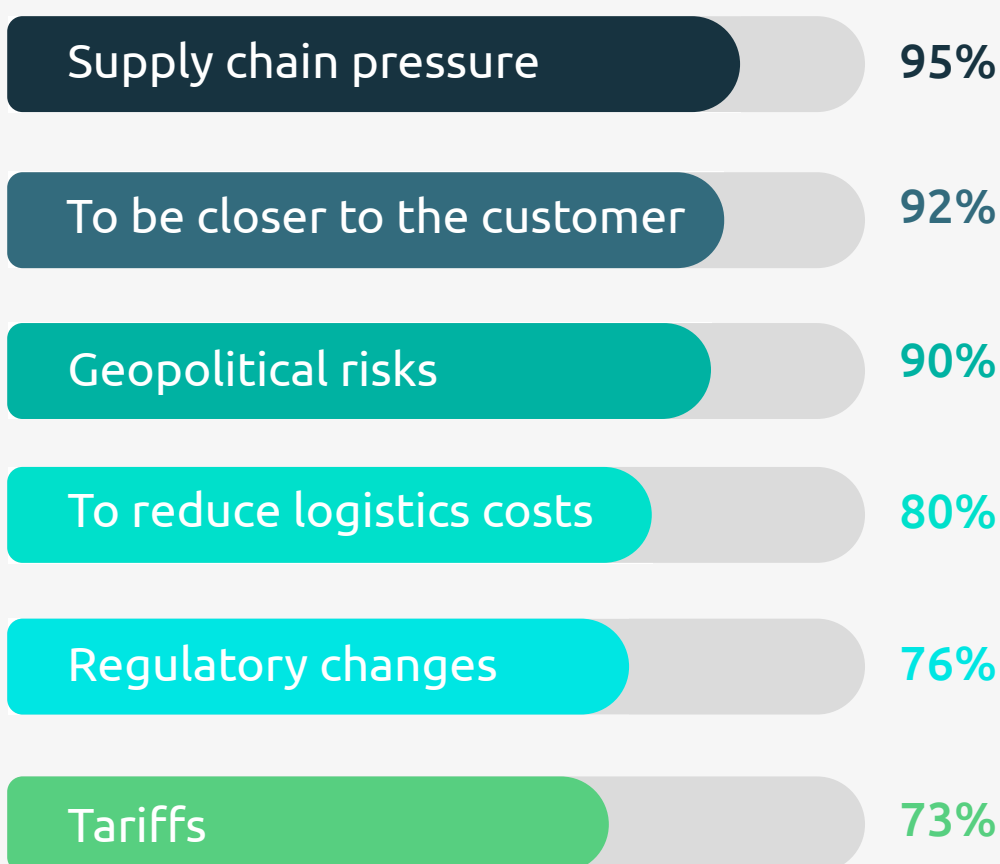


Represents percentage of organizations planning to increase investments in these regions in the next three years.



foresee a considerable reduction in supply chain reliance on China, up from 58% in 2024

Top drivers for reindustrialization



express concerns about rising tariffs affecting their operations and market access

Digital technologies reduce reindustrialization cost

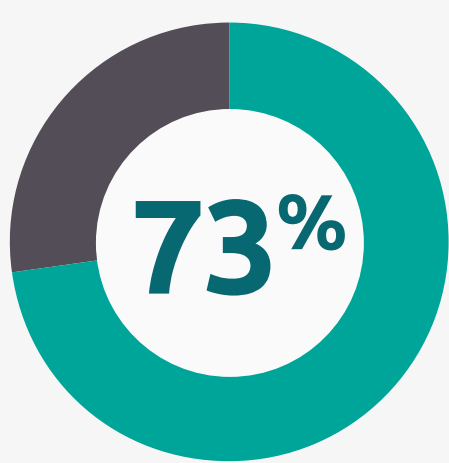


plan to invest in advanced manufacturing technologies to reduce the cost of reindustrialization initiatives

Top technology investment priorities



Reindustrialization accelerates a shift towards sustainable manufacturing



believe that reindustrialization will drive a shift toward sustainable and environmentally friendly manufacturing practices, up from 56% in 2024

Accelerating reindustrialization: Key recommendations

<p>Rightshoring: Choose the right model for your organization</p>	<p>Integrate sustainability, resilience, and agility into your reindustrialization efforts</p>	<p>Harness technology and data to manage reindustrialization costs</p>	<p>Develop a future-ready talent strategy to tackle labor and skill shortages</p>
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