

# From Global to Local: How Europe's Manufacturers Are Reconfiguring

Assessing the impact and important considerations on the European industrial manufacturing sector

April 2026



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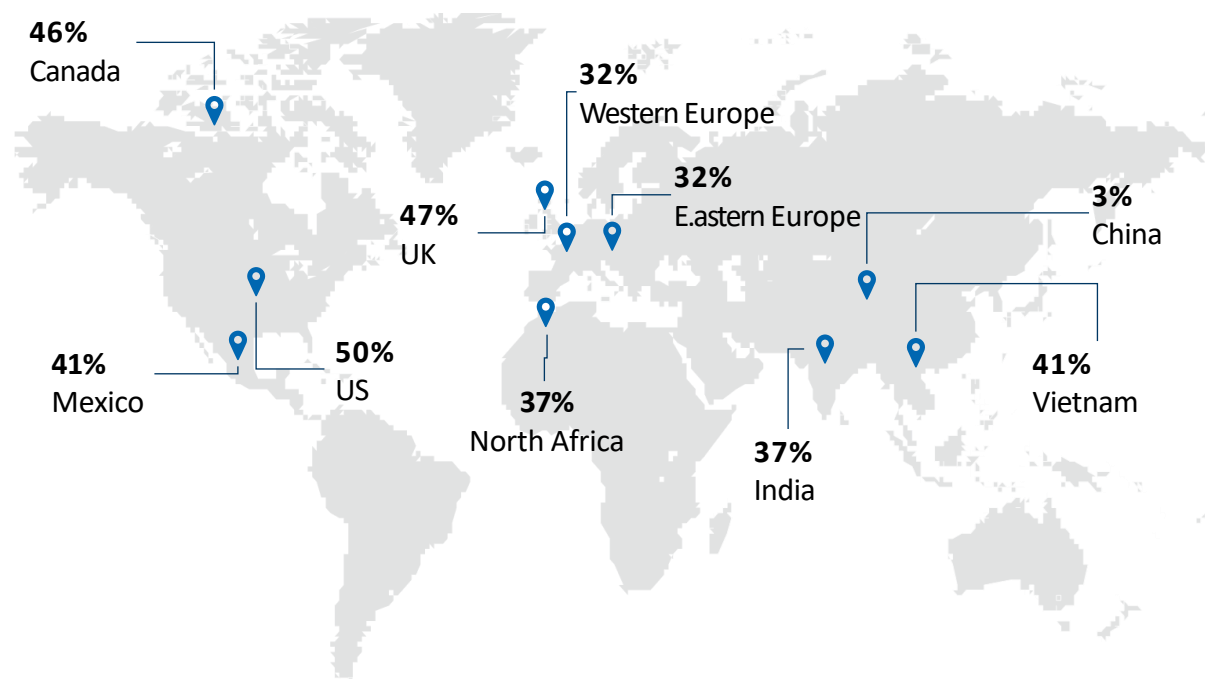
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# Reshore and Restore: Reconfiguring the Manufacturing Landscape

Globally, the manufacturing resurgence is transforming the industry, driven by the demands for resilient supply chains, geopolitical stability, proximity to markets and sustainability objectives.

## Top destinations for reindustrialization initiatives span North America, South-east Asia, Europe and North Africa<sup>1</sup>

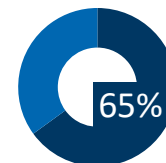


Represents percentage of organizations planning to increase investments in these regions in the next three years as part of their reindustrialization efforts.

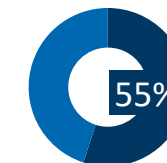
### 82%

... foresee a considerable reduction in supply chain reliance on China, up from 58% in 2024<sup>1</sup>

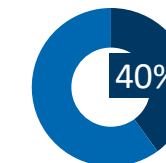
## In Europe, organisations have already initiated a focus on reindustrialization<sup>1</sup>



...of executives in Europe<sup>5</sup> say that their reindustrialization strategy is already in place or in progress, 62% of executives in the UK say the same.

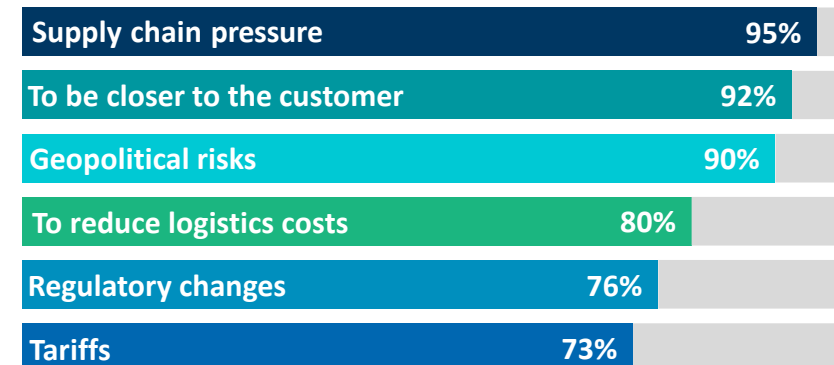


...have invested in either nearshoring<sup>2</sup> or a combination of reshoring<sup>3</sup> and nearshoring of manufacturing, 47% in the UK.



...believe friendshoring<sup>4</sup> will represent a significant proportion of their total manufacturing/production capacity in next three years, from 39% currently.

## Main catalysts for reindustrialisation<sup>1</sup>



### 73%

... express concerns about rising tariffs affecting their operations and market access<sup>1</sup>

1: Capgemini Research Institute (2025), The resurgence of manufacturing: Reindustrialization strategies in Europe and the US (Edition 2), Capgemini Research Institute (<https://www.capgemini.com/wp-content/uploads/2025/03/Final-Web-Version-Report-Reindustrialization-Edition-2.pdf>)  
 2: Nearshoring: Transferring part of manufacturing/production to a nearby or neighbouring country  
 3: Reshoring: Bringing part of manufacturing/production back to the domestic market/country of headquarters from offshore locations.  
 4: Friendshoring: Locating manufacturing/production in countries that are geopolitical and mercantile allies of the organization's home country.  
 5: Includes France, Germany, Italy, Spain, Netherlands, Denmark, Finland, Norway and Sweden.

# The Future of European Manufacturing — A Unified, Resilient, and Sustainable Industry

Europe's manufacturing sector is at a pivotal point. The vision is clear: building a more integrated, resilient, and sustainable industry by transforming fragmentation into unit

## Current Landscape

- Serial acquirers in the Netherlands' industrial and manufacturing sector are **actively scanning the market for strategic acquisition opportunities**.
- The sector begins to show signs of cautious optimism — driven by a rebound in the tech and chip industries and increasing pressure to invest in sustainability and circular production — **companies must be strategically positioned to act decisively when market conditions stabilize and consolidation accelerates**.

## Path forward

- European companies recognize that to compete globally, they **need to break down barriers — reducing regulatory fragmentation and creating a seamless single market**. This move unlocks tremendous efficiencies and scale.
- Also, as private equity activity intensifies and companies seek to **streamline operations in response to sustainability pressures and digital transformation**, it is essential for businesses to begin operationally separating non-core assets they intend to divest.

## Why it matters

- Whether through the recent Draghi report or strategic initiatives, the focus is on **fostering European champions — large, competitive firms that can innovate and thrive internationally through cross-border consolidation and collaboration**.
- It's about building strong, resilient industry leaders.

## Opportunities

- By **localizing manufacturing and harmonizing standards**, companies can better respond to regional demands, reduce supply chain risks, and embrace sustainability — **positioning Europe as a leader in green, innovative manufacturing**.
- Europe lags in creating high-value companies due to internal trade barriers and lower productivity. **There's potential to boost GDP by prioritizing European unity and efficiency**.

## Call to Action

- **Our message is simple: The future belongs to those who leverage local strengths within a unified European market — turning challenges into opportunities for growth, innovation, and leadership.**

At FTI Consulting, we understand that seizing these opportunities requires more than ambition, it demands rigorous analysis, strategic insight and trusted partnership.

Navigating this transformation requires strategic insight and due diligence - our expertise can help unlock these opportunities

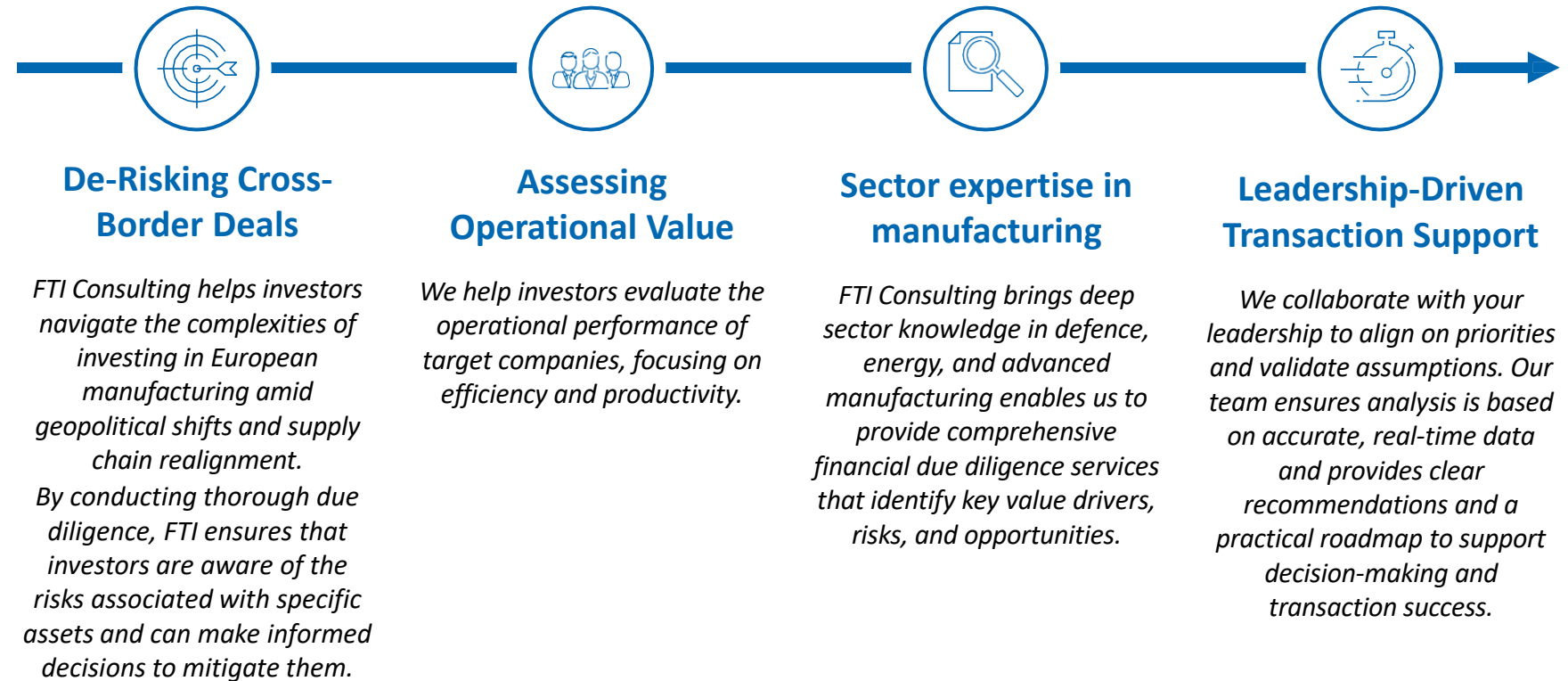
### How our Transaction Services Team can help:



- Transaction Readiness & Pre-Deal Support
- Buy-Side and Sell-Side Financial Due Diligence
  - Assess financial performance, working capital and synergy potential across plants and regions.
  - Prepare robust financials, address carve-out complexities and support sale negotiations.
  - Normalize earnings and evaluate asset-heavy balance sheets for deal structuring.

At FTI Consulting, we help clients navigate complex transactions — whether acquiring, divesting, or restructuring — by delivering deep insights into financial performance, operational efficiency, working capital, and risk exposure. Our sector-specific expertise ensures you make informed decisions, uncover value and mitigate risks across the deal lifecycle.

Engaging FTI Consulting early offers a strategic edge through comprehensive financial due diligence





When facing your  
greatest challenges  
and opportunities.

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