



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

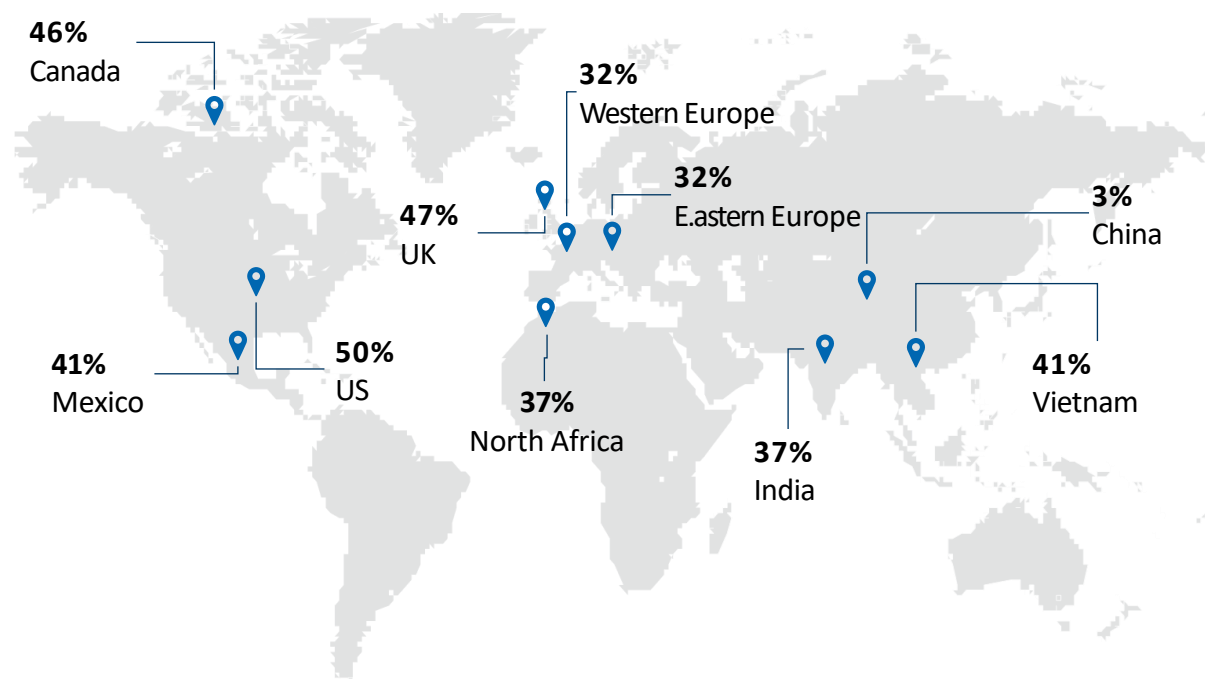
Assessing the impact and important considerations on the European industrial manufacturing sector

April 2026

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 Africa¹

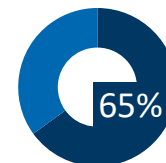


Represents percentage of organizations planning to increase investments in these regions in the next three years as part of their reindustrialization efforts.

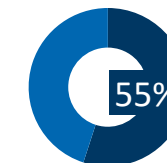
82%

... foresee a considerable reduction in supply chain reliance on China, up from 58% in 2024¹

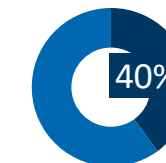
In Europe, organisations have already initiated a focus on reindustrialization¹



...of executives in Europe⁵ say that their reindustrialization strategy is already in place or in progress, 62% of executives in the UK say the same.

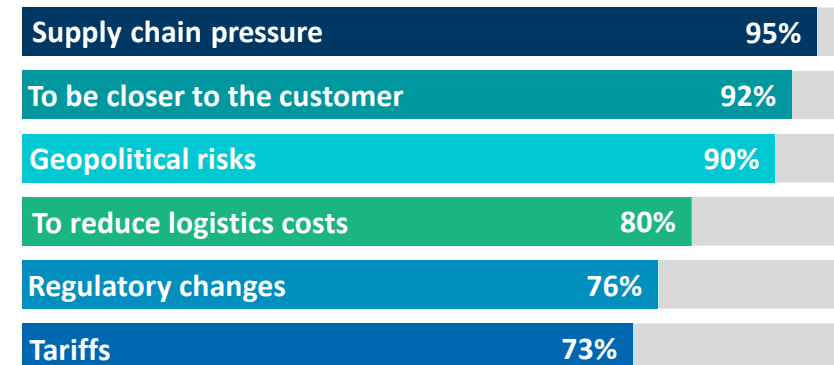


...have invested in either nearshoring² or a combination of reshoring³ and nearshoring of manufacturing, 47% in the UK.



...believe friendshoring⁴ will represent a significant proportion of their total manufacturing/production capacity in next three years, from 39% currently.

Main catalysts for reindustrialisation¹



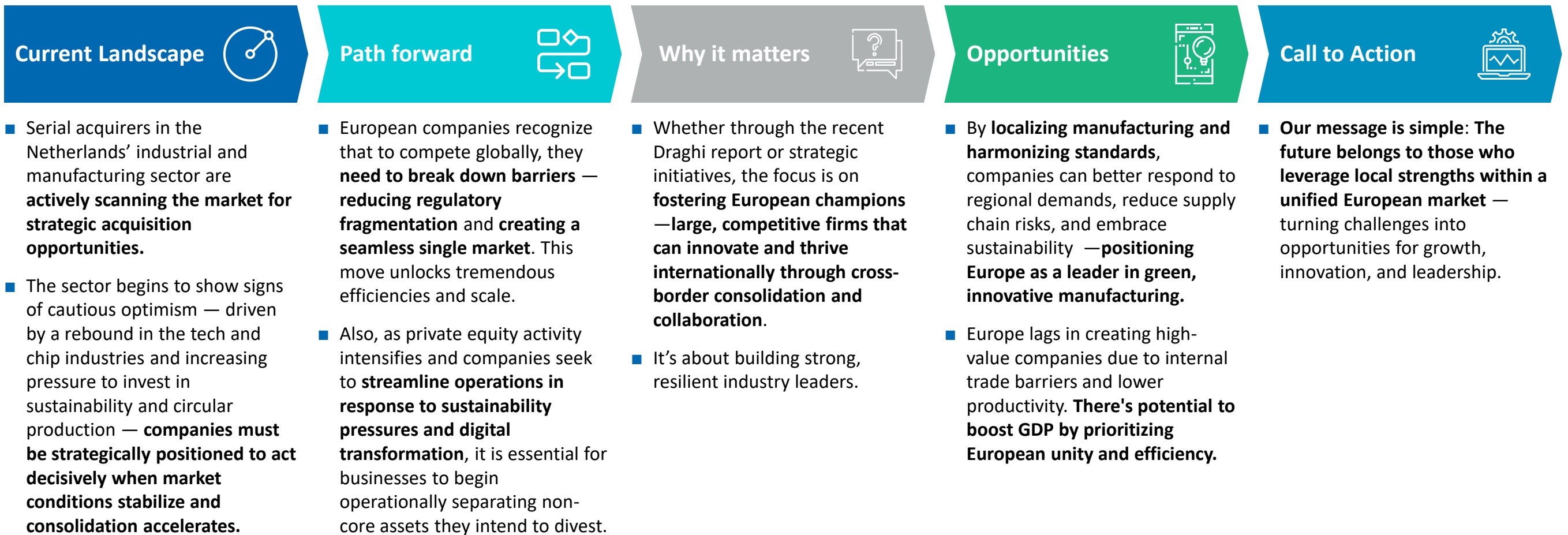
73%

... express concerns about rising tariffs affecting their operations and market access¹

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



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

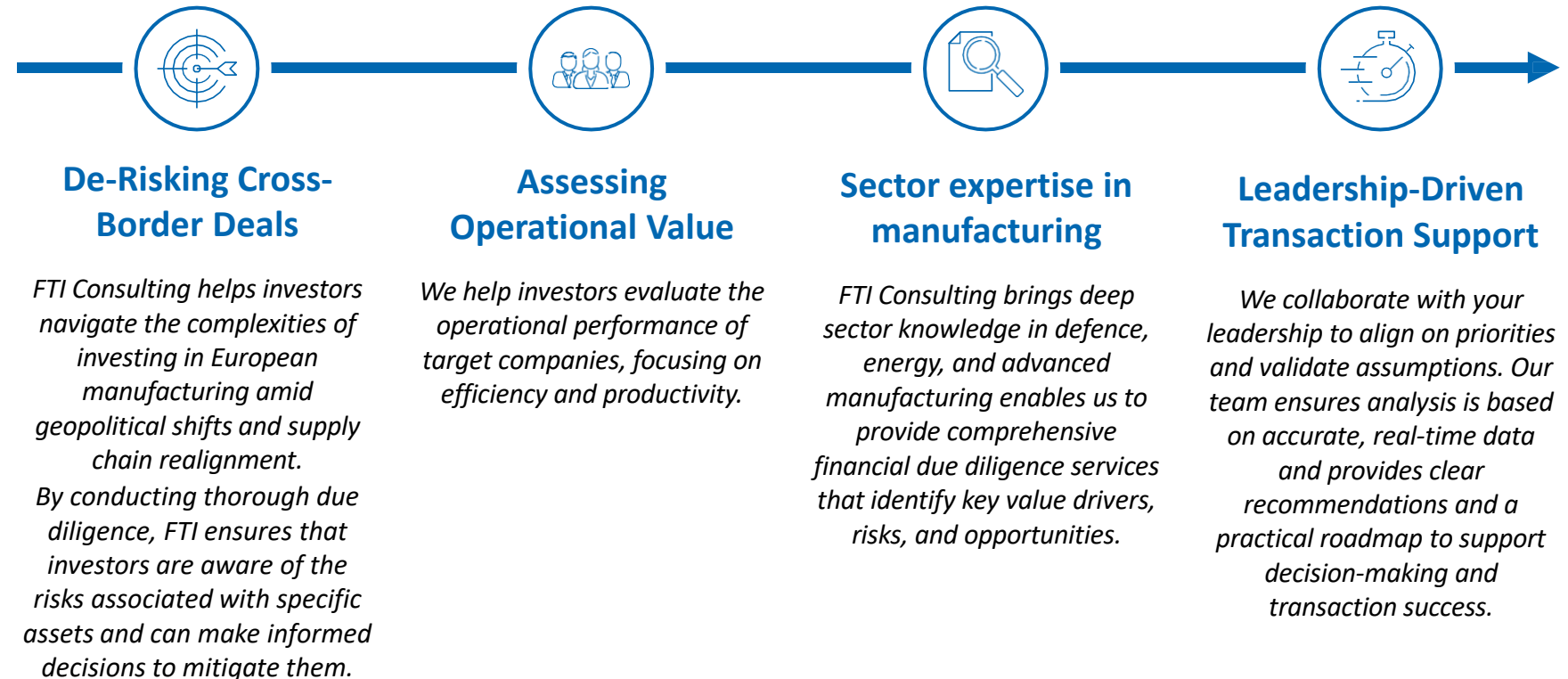
How our Transaction Services Team can help:



- 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





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greatest challenges
and opportunities.

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