

THE RESHORING TREND

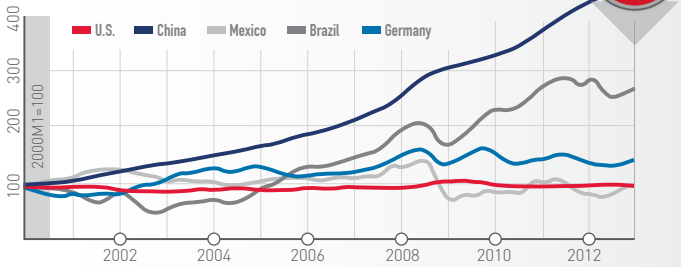
A growing number of companies across the country are bringing their manufacturing efforts back from overseas.

Reshoring Initiative
Bringing Manufacturing Back Home

Please refer to the accompanying press release to see how we can customize the infographic for your state or industry.

1 ESCALATING WAGES OVERSEAS

UNIT LABOR COSTS IN MANUFACTURING IN U.S. \$



As wages continue to increase overseas, particularly in China, it's becoming less cost effective to manufacture outside the United States.

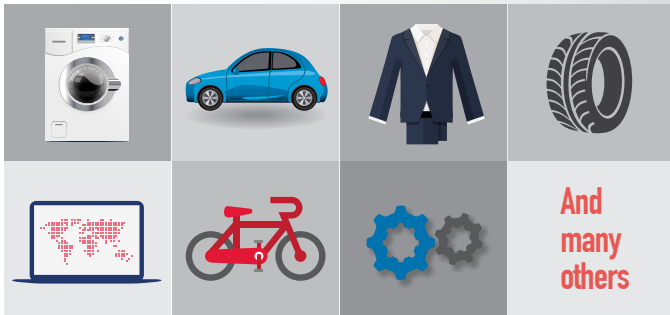
Source: Oxford Economics/Haver Analytics

3 INCLUDING LOW U.S. NATURAL GAS PRICES



Source: Federal Energy Regulatory Commission
<http://www.aei.org/publication/chart-of-the-day-world-natural-gas-prices>

5 INCLUDING THESE TOP RESHORING INDUSTRIES



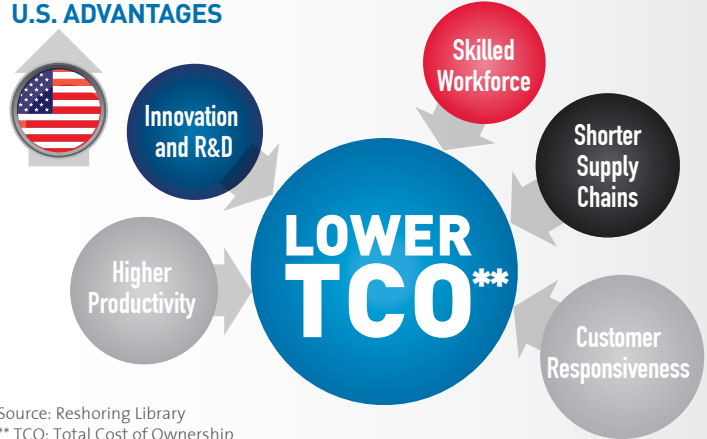
Creating, with FDI, about 170,000 U.S. manufacturing jobs since February 2010*

**About 20% of the 870,000 increase in U.S. manufacturing jobs since the recession low in February 2010.*

Source: Reshoring Initiative Library, December 31, 2014.

2 CAUSE COMPANIES TO REEVALUATE TOTAL COSTS

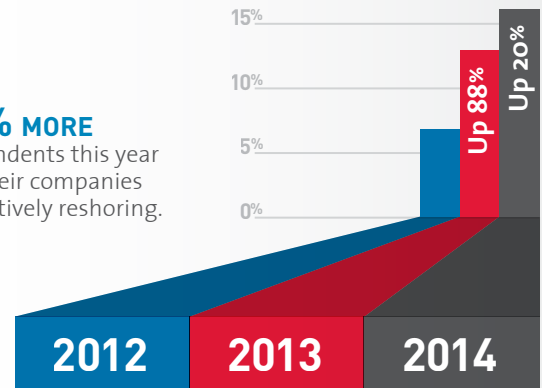
U.S. ADVANTAGES



Source: Reshoring Library
** TCO: Total Cost of Ownership

4 THEREFORE, MORE COMPANIES ARE RESHORING

20% MORE respondents this year say their companies are actively reshoring.



Source: Boston Consulting Group Survey 2012, 2013, 2014 — <http://www.slideshare.net/TheBostonConsultingGroup/bcg-mfg-survey-key-findings-slideshare-deckoctober-2014f3>

6 TOP RESHORING CASES IN THE U.S.

Company	Total Jobs	Reshored From	State	Product Reshored
Walmart	4,444	Various	Various	Consumer goods
Ford	3,250	Mexico	OH, MI	F-650, F-750, Ford Fusion, EcoBoost Engine
Caterpillar	1,900	Japan	GA, TX	Construction equipment
GE	1,900	China, Mexico	KY, NY, OH	Appliances, industrial batteries, light bulbs
GM	1,800	Mexico	TN	Small gas engine (Ecotec), SRX
Fletronics (Apple)	1,700	Abroad	TX	Mac Pro
Farouk Systems	1,200	China, South Korea	TX	Ceramic hairstyling irons
NCR	870	Brazil, China, India, Hungary	GA	ATMs, self-service checkouts
Boeing	700	Abroad	MO	Parts for the 777X
Made in America Seating	510	China	TN	Ergonomic office chairs

Source: Reshoring Initiative Library, December 31, 2014.

