Reshoring Initiative®
2025 Annual Report
Including 2026 1H Data

2025 U.S. Reshoring and FDI Hold Firm Despite Policy Uncertainty

Manufacturing reshoring job growth remained resilient despite policy uncertainty.
2025 down 5%; Projected 2026 up 25%

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Executive Summary

U.S. manufacturing reshoring and foreign direct investment (FDI) remained remarkably resilient in 2025 despite significant policy uncertainty. Companies continued to invest in domestic production to reduce risk, strengthen supply chains, and improve long-term competitiveness.

The Reshoring Initiative recorded approximately 247,000 announced reshoring plus FDI manufacturing jobs in 2025, essentially matching 2024 and achieving five years of 240,000+ jobs/year. Since 2010, more than 2.3 million manufacturing jobs have been announced through reshoring and FDI, reflecting a sustained shift toward U.S.-based production.

Several important trends emerged during the year:

- Reshoring and FDI remained strong despite uncertainty surrounding tariffs and industrial policy.
- Transportation Equipment became the leading industry for announced jobs, reflecting a shift from battery production toward complete vehicle FDI, plus drones and ships.
- Pharmaceutical investment accelerated significantly, exemplifying renewed domestic investment in critical industries.
- Tariffs became a major factor in reshoring decisions, although companies continued to emphasize long-term supply chain resilience, Skilled Workforce Availability, and Proximity to Customers as their primary motivations.
- High-Tech products continued to dominate announced investment, helping to overcome our trade deficit in High-Tech goods.
- Many companies delayed final investment decisions pending greater policy certainty, suggesting additional upside potential as industrial policy stabilizes.

The data indicate that reshoring is increasingly driven by long-term business strategy rather than short-term disruptions. Companies are placing greater value on resilient supply chains, domestic manufacturing ecosystems, skilled labor, and reduced geopolitical risk.

The findings in this report provide insight into the evolving competitiveness of U.S. manufacturing and offer policymakers, manufacturers, financial analysts, and economic developers a comprehensive view of the factors shaping future domestic investment.

Introduction

The Reshoring Initiative's Annual Report provides an assessment of U.S. manufacturing reshoring and FDI—the two primary mechanisms by which production returns to the United States. Together, these activities represent the replacement of imported goods with domestic production, strengthening U.S. manufacturing capacity, employment, and supply chain resilience. Reshoring and FDI are essentially synonyms for reindustrialization.

The report is based on the Reshoring Initiative's proprietary database—the nation's most comprehensive, continuously updated collection of reshoring and FDI manufacturing cases. Using this database, the report examines trends in manufacturing job creation, industries, geographic distribution, source countries, and the business factors influencing investment decisions. It also incorporates findings from the 2025 and 2026 National Reshoring Surveys to provide additional insight into how manufacturers evaluate sourcing and investment decisions. Details on data sources, how cases are selected and counted, and the definitions used to classify reshoring and FDI are provided in the Methodology section at the end of this report.

Although the policy environment shifted considerably during 2025, companies continued investing in U.S. manufacturing as they balanced cost, resilience, market access, workforce availability, and geopolitical risk. This report analyzes those developments and identifies the trends most likely to shape manufacturing investment in 2026 and beyond.

For organizations requiring more detailed analysis, the Reshoring Initiative's full case-level database is available for purchase. It is widely used by manufacturers, financial institutions, economic developers, policymakers, and academic researchers.

Chapter 1. Reshoring and FDI Job Trends

Resilient Manufacturing Investment Despite Policy Uncertainty

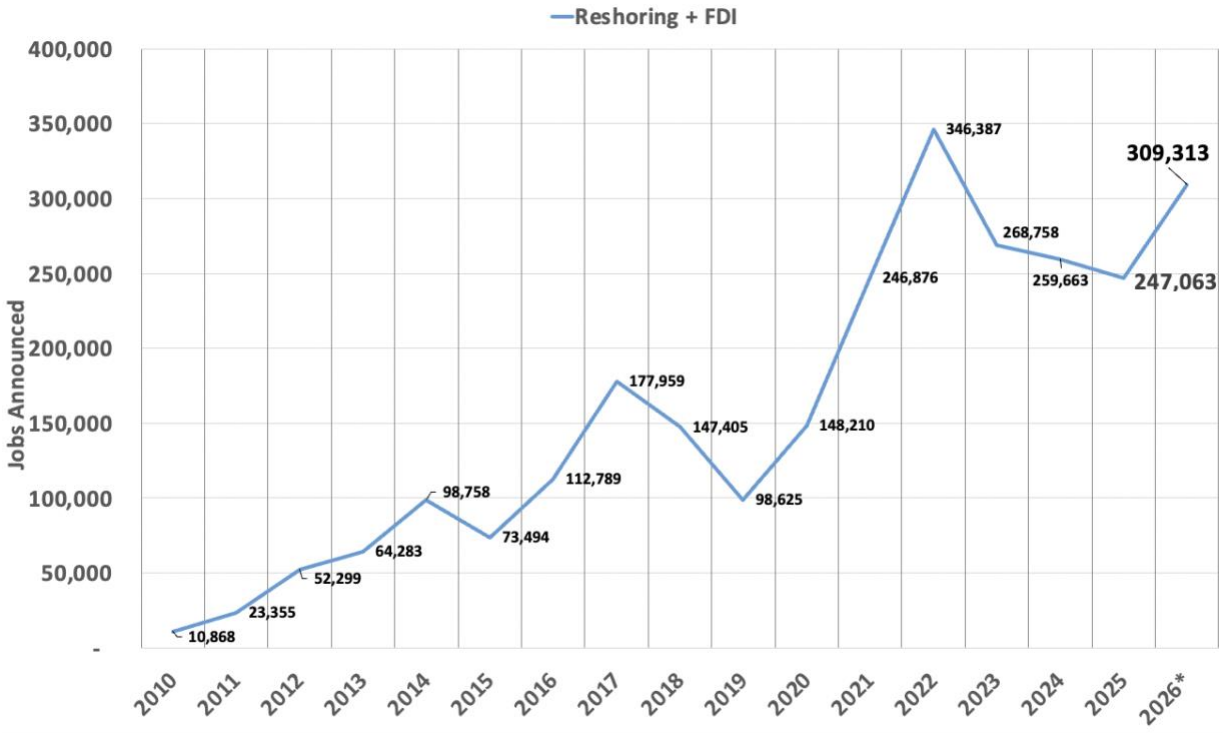
A total of 247,000 manufacturing jobs were announced through reshoring and FDI in 2025, essentially matching the strong performance of 2024 and extending one of the most significant periods of domestic manufacturing investment since the reversal of the offshoring trend began in 2010.

This resilience is particularly noteworthy given the economic and policy uncertainty that characterized much of 2025. Manufacturers faced evolving tariffs, changing industrial

policies, geopolitical tensions, and continued supply chain uncertainty. While some companies postponed irreversible capital commitments pending greater policy clarity, manufacturers overall continued expanding U.S. production as they sought to strengthen supply chains, reduce risk, minimize tariffs, and improve long-term competitiveness.

The underlying strength of the U.S. economy enabled many manufacturers to move forward with investment decisions despite an uncertain operating environment. Increasingly, companies view reshoring and FDI not as a short-term response to disruptions such as the pandemic, but as a long-term strategy to improve resilience, reduce geopolitical risk, and position production closer to customers and key markets. Although annual results fluctuate with large project announcements and changing policy conditions, the long-term trajectory remains firmly positive.

Exhibit 1.1 | **Reshoring + FDI Job Announcements by Year, 2010-2026***

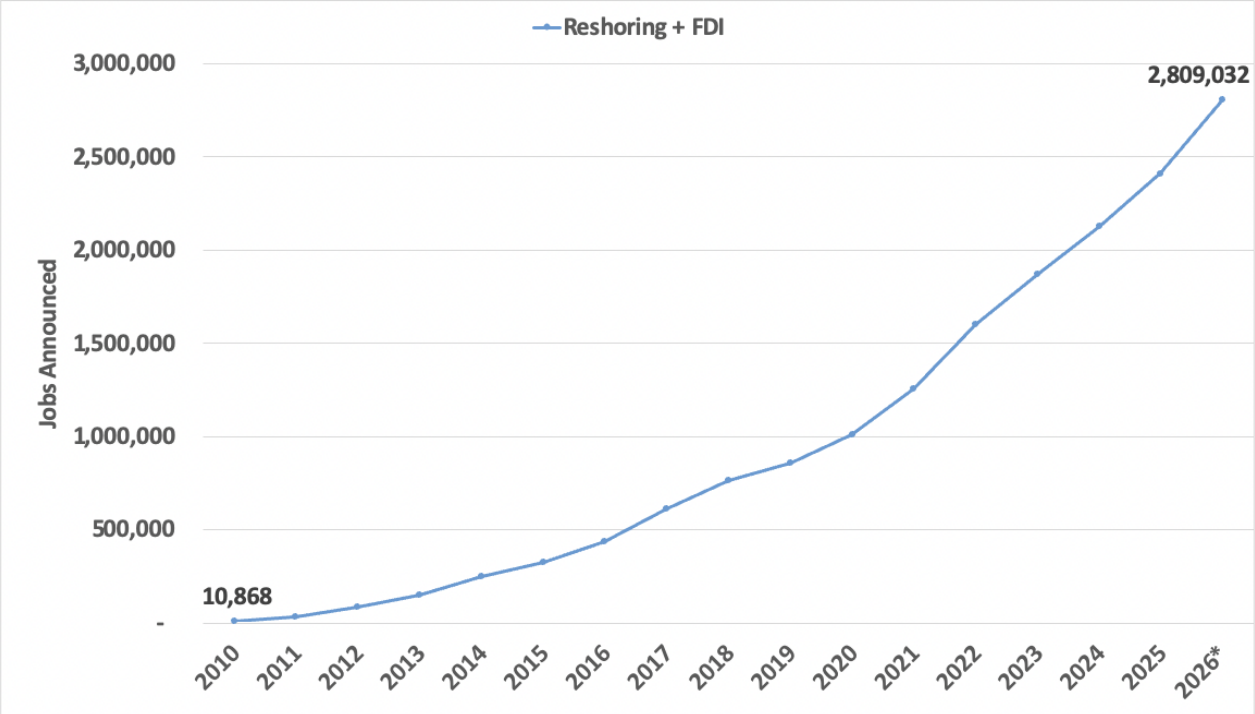


Source: RI Master Data through 1H 2026, with 2025 annualized.

Long-Term Momentum Continues

Since 2010, companies have announced more than **2.8 million U.S. reshoring and FDI jobs**. An estimated **1.8 million of these jobs have already been filled**, while the remainder are expected to come online over the next several years as committed facilities become operational.

Exhibit 1.2 | **Cumulative Jobs Announced, Reshoring + FDI, 2010-2026***



Source: RI Master Data through 1H 2026, with 2025 annualized.

The first one million announced jobs required about a decade to achieve, driven largely by growing recognition that the hidden costs and risks of offshoring often outweighed apparent labor-cost advantages.

Growth accelerated dramatically over the past five years. More than **1.3 million additional jobs** have been announced as companies have increasingly prioritized the benefits of domestic sourcing over labor-cost differences in making investment decisions.

Reshoring Continues to Outpace Foreign Direct Investment

While both reshoring and foreign direct investment remain important contributors to U.S. manufacturing growth, reshoring continued to account for the majority of announced jobs in 2025.

Reshoring announcements totaled approximately **153,000 jobs**, representing about **62 percent** of all announced reshoring plus FDI manufacturing jobs, while FDI announcements totaled approximately **94,000 jobs**.

Exhibit 1.3 | **2025 Jobs Announced and Cases, Reshoring vs. FDI**

Category	Jobs	Cases	% Jobs
Reshoring	152,734	950	62%
FDI	94,329	560	38%
Total:	247,063	1,509	

Source: RI Master Data through 1H 2026, with 2025 annualized. Cases may not sum to the total because joint ventures are split between reshoring and FDI.

Reshoring and FDI replace imported goods with domestically produced goods, and thus strengthen U.S. manufacturing capacity and expand domestic supply chains. Domestic companies primarily reshore to reduce offshore risk and improve supply chain resilience, while foreign manufacturers increasingly invest in U.S. production to serve the world's largest consumer market while avoiding tariff impacts. Together, they represent complementary pathways toward U.S. reindustrialization.

Conditional Announcements Suggest Additional Upside

Although 2025 investment remained strong, announced job totals likely understate the full level of manufacturing interest during the year. Many companies announced plans to expand U.S. manufacturing but made final investment decisions conditional on greater certainty around tariffs, trade and tax policy, and other elements of the evolving industrial policy framework.

Of the 64 conditional reshoring and FDI announcements identified in 2025, 14 have already converted, either fully or partially, into confirmed manufacturing projects. As policy direction has become clearer in 2026, the number of new conditional announcements has declined substantially, suggesting that manufacturers are becoming more confident in making long-term investment commitments.

This trend suggests that additional conditional projects may move forward and supports expectations for continued manufacturing investment as policy uncertainty declines—or as companies become increasingly comfortable making long-term decisions despite some remaining uncertainty.

2026 Outlook

Based on announcements through the first half of 2026, the Reshoring Initiative projects that approximately 309,000 manufacturing jobs (see Exhibit 1.1) will be announced during the year, bringing cumulative announced reshoring and FDI employment since 2010 to roughly **2.7 million jobs**.

Continued momentum will depend on industrial policy, access to skilled labor, use of Total Cost of Ownership (TCO) in sourcing decisions, and ongoing improvements in U.S. manufacturing competitiveness. If those conditions continue to improve, the large number of conditional projects announced during 2025 may represent the beginning of another significant wave of reshoring and foreign direct investment.

Chapter 2. Industry and Technology Trends

The Composition of Manufacturing Investment Continues to Evolve

Transportation Equipment became the largest industry for announced jobs in 2025, while pharmaceuticals accelerated, batteries moderated, and chips were stable. Together, these changes indicate that U.S. manufacturing investment is becoming more diversified across strategic industries rather than concentrated in a single sector.

Exhibit 2.1 | **Reshoring + FDI by NAICS Code Industry: Percent of Total Jobs, 2024, 2025, 2026**

2025 Rank	Industry	2025 Jobs	2025 Cases	2024 % of Total Jobs	2025 % of Total Jobs	2026 % of Total Jobs
1	Transportation Equipment	48,786	198	9%	20%	30%
2	Computer & Electronic Products	44,877	240	35%	18%	20%
3	Chemicals (incl. pharmaceuticals)	37,265	269	9%	15%	12%
4	Electrical Equipment, Appliances & Components (incl. EV batteries)	36,188	185	31%	15%	14%
5	Machinery	22,946	129	4%	9%	6%
6	Medical Equipment & Supplies	11,097	92	1%	5%	1%
7	Fabricated Metal Products	10,945	82	2%	4%	4%
8	Primary Metal Products (excluding castings)	10,891	73	4%	4%	5%
9	Wood & Paper Products	5,181	30	1%	2%	1%
10	Food & Beverage	4,653	38	2%	2%	5%
11	Plastic & Rubber Products	3,509	48	0%	1%	1%
12	Apparel & Textiles	3,470	40	0%	1%	0%
13	Castings/Foundries - Subset of Primary Metal Products	2,395	10	1%	1%	1%
14	Nonmetallic Mineral Products	1,663	29	1%	1%	0%
15	Furniture and Related Products	1,402	27	1%	1%	0%
16	Hobbies (subset of Miscellaneous)	458	9	0%	0%	0%
17	Miscellaneous (excluding hobbies)	0	0	0%	0%	0%

Source: RI Master Data through 1H 2026, with 2026 annualized.

Transportation Equipment Takes the Lead

Transportation Equipment ranked first in announced manufacturing jobs during 2025, reflecting a broad shift in automotive investment priorities. While recent years were dominated by electric vehicle battery manufacturing (categorized as Electrical Equipment by NAICS code), investment has shifted into complete vehicle assembly and the broader transportation ecosystem, largely in response to tariffs.

Semiconductor Investment Remains Exceptionally Strong

Although Computer and Electronic Products no longer ranked first in 2025, semiconductor manufacturing remains one of the strongest areas of U.S. manufacturing investment. Federal incentives and growing concern over semiconductor supply chain security continue to support domestic expansion. The industry's lower ranking reflects faster growth in Transportation Equipment—not weaker semiconductor investment.

Pharmaceuticals Become a Major Growth Industry

Pharmaceutical manufacturers continue to diversify supply chains, reduce dependence on overseas production, and respond to tariff uncertainty and growing concerns over pharmaceutical security. Some pharma investment is probably an effort to both minimize tariffs and reduce the pressure to lower U.S. drug retail prices to the level of other developed countries.

Recent FDA initiatives[1]—including programs intended to accelerate regulatory review for new domestic manufacturing facilities—may further encourage U.S.-based investment. Numerous pharmaceutical companies have announced large prospective manufacturing investments that remain conditional upon future policy developments, suggesting continued growth in this sector.

Battery Investment Gives Way to Broader Manufacturing

Electrical Equipment declined relative to 2024 as investment shifted away from EV battery production toward broader manufacturing activities, including complete vehicle assembly. The change reflects a reallocation of manufacturing investment rather than a decline in overall industry manufacturing activity.

Emerging Industry Themes

Beyond the industry rankings, several broader trends deserve attention.

Data Centers

Rapid growth in artificial intelligence and cloud computing is driving major investment in U.S. data centers, increasing demand for semiconductors, electrical equipment, power

[1] To reduce the nation's reliance on overseas supply chains, the FDA launched the PreCheck pilot program to accelerate the regulatory review and construction of new U.S.-based manufacturing facilities. The initiative streamlines the approval process by facilitating early communication with agency officials during the facility design stage and expediting the review of manufacturing controls. Additionally, the agency has proposed pilot programs to grant priority review and earlier exclusivity periods to generic drugmakers who test and produce their medicines exclusively in the U.S.

systems, cooling technologies, networking hardware, and construction materials. Although building data centers is not classified as manufacturing, per se, the production of the equipment to install in the data centers is an important driver of manufacturing investment across multiple industries.

Innovation Is Lowering Barriers to Reshoring

There are early signs that American innovation and capital investment can overcome some of the cost and resource barriers to reshoring. Many U.S. machining facilities are investing heavily in automation, with some expecting productivity gains sufficient to compete with Chinese production. New rare-earth processing technologies also promise to reduce costs and environmental impacts, potentially making more domestic production economically viable.

At the same time, investment in advanced nuclear technologies—including small modular reactors and, over the longer term, fusion energy—could help the United States maintain an abundant and internationally competitive electricity supply. Together, these developments illustrate how American ingenuity, technology, and capital markets can strengthen the business case for domestic manufacturing.

Manufacturing Continues Moving Up the Technology Ladder

Perhaps the most consistent long-term trend is not which industries lead investment, but the high technology level of those industries. More than four out of every five manufacturing jobs announced in 2025 were associated with High or Medium-High Tech products, continuing the long-term shift toward advanced manufacturing.

Exhibit 2.2 | **2025 Job Announcements by Technology Level**

	Reshoring		FDI		Reshoring + FDI	
Product Technology Level	**Jobs**	**Cases**	**Jobs**	**Cases**	**Jobs**	**Cases**
High	37%	37%	35%	29%	36%	34%
Medium-High	44%	35%	45%	37%	45%	36%
Medium-Low	14%	21%	13%	24%	14%	22%
Low	5%	7%	7%	10%	6%	8%
H+MH	81%	72%	80%	66%	81%	70%
ML+L	19%	28%	20%	34%	19%	30%

Source: RI Master Data through 1H 2026, with 2026 annualized.

This concentration in High/Medium-High Tech industries reflects the strategic industries currently receiving the greatest public and private investment, including semiconductors, transportation equipment, pharmaceuticals, aerospace, drones, and advanced machinery.

Because the United States continues to run large trade deficits in High-Tech products, expanding domestic production in these industries is key to improving supply chain resilience and long-term industrial competitiveness.

Looking Ahead

Preliminary 2026 data suggest that the transition toward High-Tech industries is continuing.

Exhibit 2.3 | **2026* Job Announcements by Technology Level**

	Reshoring		FDI		Reshoring + FDI	
Product Technology Level	**Jobs**	**Companies**	**Jobs**	**Companies**	**Jobs**	**Companies**
High	58%	36%	18%	22%	45%	31%
Medium-High	30%	36%	42%	34%	34%	35%
Medium-Low	11%	24%	24%	33%	15%	27%
Low	1%	4%	16%	11%	6%	7%
H+MH	88%	72%	60%	56%	79%	66%
ML+L	12%	28%	40%	44%	21%	34%

Source: RI Master Data through 1H 2026, with 2026 annualized.

Although annual rankings will continue to fluctuate, the broader direction remains clear. U.S. manufacturing investment is increasingly concentrated in industries that are strategically important, technologically sophisticated, and critical to national competitiveness.

Rather than returning to the manufacturing mix of previous decades, reshoring and FDI are helping build a more advanced industrial base centered on High-Tech products, resilient supply chains, and long-term strategic capabilities.

Chapter 3. Drivers of Reshoring and FDI

Why Companies Are Investing in U.S. Manufacturing

Reshoring and FDI location decisions continue to evolve in response to economic conditions, geopolitical risk, industrial policy, and technological change. Although the relative importance of individual factors shifts over time, the broader direction remains consistent: companies are seeking more resilient supply chains, stronger domestic production capabilities, and improved long-term competitiveness.

The 2025 data reveal two parallel trends: tariffs rose sharply as a reported trigger, while established factors continued to determine where companies invested.

Exhibit 3.1 | **Top Factors Driving Reshoring and FDI: 2024, 2025, 2026***				
2025 Ranking	**Factor**	**2024 Citations**	**2025 Citations**	**2026* Citations**
1	Ecosystem Synergies (Healthy Local Supply Chain)	151	608	469
2	Proximity to Customers/Market	315	516	407
3	Skilled Workforce Availability/Training	379	472	432
4	Government Incentives	752	469	482
5	Impact on Domestic Economy	246	442	347
6	Supply Chain Interruption Risk	249	250	294
7	Infrastructure	119	237	190
8	Manufacturing/Engineering Joint Innovation (R&D)	96	179	122
9	Higher Productivity	113	158	153
10	Tariffs	11	146	49
11	Image/Brand of Made-in-USA	100	144	60
12	Lead Time/Time to Market	124	115	91
13	Automation/Technology	59	97	137
14	Underutilized Capacity	68	93	84
15	Green Considerations	81	65	37
16	Geopolitical Risk	9	38	17
16	Lean/Other Business Process Improvement Techniques	13	38	46
18	Customization/Flexibility	31	32	22
19	Better Control of Process/Delivery/Factory	48	27	59
20	Quality/Rework/Warranty	18	24	11
20	Raw Materials Cost	59	24	17
22	Price	12	20	0
23	U.S. Price of Natural Gas/Chemicals/Electricity	16	18	0
24	3D Printing/Additive Manufacturing	23	15	35
25	Total Cost	18	10	15
26	Freight Cost	8	6	6
26	Intellectual Property Risk	9	6	6

28	Strained Offshore Relationships	9	5	17
28	Social/Ethical Concerns	15	5	6

Source: RI Master Data through 1H 2026, with 2026 annualized.

Traditional Competitive Advantages Continue to Dominate

The most frequently cited reasons for reshoring in 2025 remained the long-standing competitive advantages of U.S. manufacturing.

Ecosystem Synergies (a healthy domestic supply chain) ranked first. Reshoring and FDI continue to fill supply chain gaps, expanding domestic capacity in raw materials, components, logistics, distribution, and advanced manufacturing technologies. As these capabilities strengthen, they make additional reshoring more attractive.

Proximity to Customers ranked second. Production near end markets shortens lead times, improves responsiveness to changes in demand, lowers transportation costs, and supports better customer service. In many sectors, the U.S. offers the world's largest market.

Skilled Workforce Availability also remained a leading consideration. As manufacturing becomes more technologically sophisticated, workforce quality increasingly matters more than labor cost alone. Some public statements may reflexively praise the local workforce, but the frequency of these citations also reflects employers' genuine appreciation of their technical talent and the gradual improvements in technical college and apprenticeship programs.

Government Incentives Remain Important

Government Incentives ranked fourth in 2025, although citations declined approximately 38 percent from 2024.

The decline coincided with a shift in federal policy emphasis from the Biden administration's IRA and CHIPS subsidies toward the Trump administration's tariffs. Preliminary 2026 data show incentive citations stabilizing, indicating that incentives remain an important part of many investment decisions even as their relative prominence changes. In most cases, the incentives are enough to influence the decision of where to locate in the U.S., but not, on their own, enough to offset higher U.S. costs.

Tariffs Emerged as a Major New Driver

The largest year-over-year change in 2025 was the surge in companies identifying tariffs as a reshoring factor.

Tariff citations increased more than twelvefold from 2024. At their 2025 peak, tariffs often appeared to be the deciding factor in public announcements.

These statements require careful interpretation. Companies may cite tariffs because tariffs materially enhance project economics, but public comments can also reflect a desire to align with the administration's policy priorities. After the Supreme Court ruled in February 2026 that IEEPA did not authorize the administration's tariffs, policy uncertainty continued, and tariff citations declined during the first half of 2026.

The decline in citations does not mean tariffs ceased to matter. Tariffs of 15% are often enough to offset the manufacturing cost difference vs. other developed countries. Tariffs of 25% offset about 40% of the cost difference vs. China. Tariffs typically reinforce longer-term reasons to localize production, including supply chain resilience, customer proximity, domestic capacity, and reduced geopolitical risk.

Other Emerging Drivers

Beyond tariffs, several factors gained importance in early 2026 and may play a larger role in future reshoring decisions.

Supply Chain Interruption Risk continued to rise as companies applied lessons from pandemic disruptions and geopolitical instability.

Automation and advanced manufacturing technologies also became more important. Manufacturers are using automation to offset labor constraints, raise productivity, improve quality, and strengthen global competitiveness.

Additive Manufacturing (3D Printing) continues to expand as companies explore more localized and flexible production models.

Strained Offshore Relationships also rose as a cited factor in early 2026, reflecting concern about geopolitical tensions and trade uncertainty. Their influence is probably understated because companies may avoid publicly criticizing countries in which they still operate facilities or maintain suppliers.

Artificial Intelligence Is an Emerging Driver

Although the Reshoring Initiative does not yet track artificial intelligence (AI) as a separate reshoring driver, manufacturers increasingly use it for predictive maintenance, quality inspection, collaborative robotics, and supply chain optimization. Many still face a productivity paradox, however: pilot projects do not always produce measurable financial returns.

Manufacturers remain cautious: in the 2026 National Reshoring Survey, only 33% believe AI and automation will make U.S. manufacturing competitive enough by 2040 to cut imports by 50%. The Reshoring Initiative believes confidence would be higher if respondents expected the skilled workforce shortage to be solved and tariffs or a lower dollar to help level the cost playing field.

Survey Results Reveal Additional Insights

The Reshoring Initiative's National Reshoring Survey provides a complementary perspective by privately asking manufacturers directly how they evaluate investment decisions rather than relying only on public announcements.

Survey responses generally reinforce the trends in reported reshoring cases but place greater emphasis on three factors that appear underrepresented in public reporting:

- Geopolitical Risk
- Close integration between manufacturing and engineering (R&D)
- Lack of a Skilled Workforce

These results indicate that public announcements do not always reveal the strategic considerations that shape manufacturing investment decisions.

Geopolitical Risk Is Increasingly Important

Although Geopolitical Risk ranked only sixteenth in publicly reported cases, the Reshoring Initiative believes its actual influence is substantially greater than the reported frequency suggests.

Recent events illustrate how geopolitical instability can alter sourcing, logistics, and investment decisions. The U.S.-Iran conflict is disrupting shipping routes and adding uncertainty to global supply chains. Russia's invasion of Ukraine encouraged manufacturing FDI from Western Europe into the United States as companies sought greater energy security and supply chain stability.

China remains the largest source of reshoring activity among cases that report a country of origin, accounting for approximately two-thirds of those cases. Chinese FDI in the United States remains limited, although additional investment may occur as manufacturers respond to changing tariff policies. Tensions between China and Taiwan have also

encouraged companies, particularly Taiwanese manufacturers, to diversify production locations as a form of geopolitical insurance.

Workforce Remains the Long-Term Constraint

Across the Reshoring Initiative's data sources, **Skilled Workforce Availability consistently** emerges as one of the greatest long-term constraints on expanding U.S. manufacturing.

Apprenticeships and technical college enrollment have expanded substantially over the past decade, but demand for skilled workers continues to exceed supply. The shortage of skilled construction workers delays launches of reshoring factories.

Sustaining reshoring momentum will require continued investment in basic education, workforce development, automation, engineering education, recruitment and immigration policies that expand the nation's manufacturing talent base.

Chapter 4. Geographic Trends

Asia Still the Largest Source of Reshoring and FDI

The geographic sources of reshoring and FDI continued to evolve in 2025 as manufacturers responded to shifting tariffs, industrial policy, geopolitical risks, and supply chain strategies. While Asia remained the largest source of reshoring and FDI activity, significant shifts occurred across other regions as companies reassessed where to locate production serving the U.S. market.

Approximately half of all announced jobs in 2025 originated from Asia, reflecting the region's continued dominance in global manufacturing. Canada and Mexico's combined share rose to a historically high 17 percent, while early 2026 data indicate a notable increase in manufacturing investment originating from Western Europe.

These changing regional patterns demonstrate how quickly manufacturers adapt their sourcing and production strategies in response to evolving economic conditions and policy environments.

Exhibit 4.1 | **2025 and 2026, Reshoring + FDI by International Region From**

Rank by 2025 Jobs	Region	Jobs	Cases	% of Total Jobs, 2025	% of Total Jobs, 2026
1	Asia	52,424	204	50%	43%
2	Western Europe	27,937	285	27%	40%

3	Canada and Mexico	17,695	78	17%	11%
4	Middle East	2,897	20	3%	1%
5	Australia/Oceania	2,441	18	2%	2%
6	South/Central America	1,365	8	1%	1%
7	Eastern Europe	639	10	1%	2%
8	Africa	0	0	0%	0%

Source: RI Master Data through 1H 2026, with 2026 annualized.

Manufacturers Shift from Nearshoring to Reshoring in 2025 and 2026

Over the past several years—particularly during the Biden administration—many manufacturers moved production from Asia to Mexico and Canada. This nearshoring strategy shortened supply chains while preserving cost advantages available under the USMCA framework, offering companies a middle ground between distant offshore production and higher-cost U.S. manufacturing.

We identified fewer published nearshoring announcements in 2025 and the first half of 2026 than in 2023 and 2024. The public foreign direct investment data present a more nuanced picture: manufacturing inward FDI rose sharply in Canada in 2024, remained broadly stable in Mexico, and declined from elevated levels in the United States. However, these figures include acquisitions, reinvested earnings, and intercompany transactions, so they should not be interpreted as a direct measure of nearshoring or new manufacturing capacity.

In 2025, investment in Canada and Mexico appeared to center more on expansions than new manufacturing projects. Nearshoring may still make sense for many companies, but the evolving U.S. tariff environment appears to be slowing some new investment—and making companies less inclined to publicize their nearshoring moves.

Manufacturing inward FDI, current US$ billions	2022	2023	2024	2025*
United States	142.6	115.1	109.6	
Canada	9.7	12.7	29.5	8
Mexico	12.7	18.1	18.1	14

Sources: OECD manufacturing FDI methodology and data; OECD Data Explorer; Mexico 2025 statistical report; and Statistics Canada.

**2025 figures are estimates and have not been finalized. †U.S. 2025: BEA, New Foreign Direct Investment in the United States, 2025 (June 10, 2026), manufacturing-sector*

expenditures; preliminary. This BEA series is measured differently from the OECD data used for 2022–2024 and is not directly comparable.

Asia Remains the Largest Source of Reshoring plus FDI

South Korea led all countries in 2025, driven largely by FDI in semiconductors, batteries, and other advanced manufacturing industries. China ranked second overall and was the largest source of reshoring, likely because of ongoing trade tensions and China's central role in global manufacturing supply chains. Most of the remaining jobs came from highly developed industrial nations rather than lower-cost manufacturing economies, a sign that reshoring and FDI increasingly reflect advanced-industry investment rather than a search for cheap labor.

Exhibit 4.2 | **2025 Reshoring + FDI Top Countries of Origin (of those reporting country from)**

Rank by Jobs	Country	Jobs	Cases	Average Jobs/Case	% of Total Jobs
1	South Korea	24,521	39	629	23%
2	China	11,260	50	225	11%
3	Mexico	10,368	15	678	10%
4	Japan	9,269	62	149	9%
5	Canada	7,327	57	128	7%
6	Germany	7,275	74	99	7%
7	Switzerland	5,501	26	216	5%
8	Taiwan	5,150	27	191	5%
9	Ireland	3,939	20	194	4%
10	France	2,219	30	74	2%
11	United Arab Emirates	2,075	8	277	2%
12	Import Substitution and Critical Products (See Methodology)	1,886	12	164	2%
13	United Kingdom	1,800	27	67	2%
14	India	1,614	14	120	2%
15	Sweden	1,377	17	83	1%
16	Brazil	1,365	8	182	1%
17	Italy	1,182	24	49	1%
18	Denmark	852	11	81	1%
19	Turkey	827	6	138	1%
20	Belgium	825	15	55	1%

Source: RI Master Data. Average Jobs/Case is based on adjusted totals and may not equal Jobs ÷ Cases.

Western Europe Gains Momentum in 2026

Preliminary 2026 data reveal another emerging trend: a substantial increase in announced investment originating from Western Europe.

The United Kingdom, France, Italy, and several other European countries account for a much larger share of announced jobs than in 2025. This shift likely reflects continued geopolitical uncertainty, high energy costs in parts of Europe, tariffs, and the growing attractiveness of locating production closer to the U.S. consumer market. Another likely reason: Europe's manufacturing cost is about 10 to 15% lower than U.S. cost, on average. China's and low-wage Asia's costs are typically 25 to 40% below U.S. cost. Applying a 15% tariff to all countries makes Europe non-competitive on a Landed Cost or TCO basis while leaving Asia with a Landed Cost advantage, before calculating Total Cost of Ownership.

Although only partial-year data are available, Western Europe appears positioned to become one of the leading sources of reshoring and FDI during 2026.

Exhibit 4.3 | **2026* Reshoring + FDI Top Countries of Origin**

Rank by Jobs	Country	Jobs	Cases	Average Jobs/ Case	% of Total
1	South Korea	17,403	51	341	17%
2	United Kingdom	17,370	48	362	17%
3	Japan	16,011	62	260	16%
4	Canada	10,737	74	145	11%
5	Germany	6,060	63	96	6%
6	France	4,683	36	130	5%
7	Italy	4,644	33	141	5%
8	Taiwan	4,515	12	376	4%
9	Brazil	3,510	9	390	3%
10	Switzerland	3,180	27	118	3%
11	Australia	2,100	15	140	2%
12	China	2,008	27	73	2%
13	Austria	1,626	6	271	2%
14	Luxembourg	1,170	9	130	1%
15	Israel	1,068	17	64	1%
16	Spain	900	3	300	1%
17	Netherlands	840	15	56	1%
18	Finland	750	3	250	1%
19	Belgium	609	21	29	1%
20	Ireland	600	3	200	1%

Source: RI Master Data YTD through 1H 2026, annualized.

Texas Continues to Lead on Jobs

Texas remained the nation's leading destination for announced reshoring and FDI jobs in 2025, continuing a trend that has persisted for several years. Its combination of competitive operating costs, abundant industrial land, right-to-work laws, logistics infrastructure, and a rapidly expanding supplier ecosystem continues to make it one of the most attractive manufacturing locations in the United States.

North Carolina and **Georgia** also ranked among the nation's leading manufacturing destinations, supported by strong automotive, aerospace, life sciences, and advanced manufacturing investments. South Carolina, Michigan, Tennessee, and Ohio likewise maintained strong manufacturing activity, reflecting the continued strength of established industrial clusters.

California remained in the top ten despite its relatively high operating costs, suggesting that advanced technology manufacturing and expansions by existing companies continue to offset some of the state's competitive disadvantages.

Preliminary 2026 data indicate particularly strong growth in **Idaho**, driven largely by Micron's major semiconductor investment, while California's share also increases as technology-related manufacturing projects continue to expand.

Exhibit 4.4 | **Top States by Announced Jobs, 2025 and 2026***						
Rank by 2025 Jobs	**State**	**2025 Jobs Announced**	**2025 Cases**	**2025 Average Jobs/Case**	**% of Total Jobs, 2025**	**% of Total Jobs, 2026***
1	TX	31,910	160	199	14%	13%
2	NC	21,387	105	204	9%	11%
3	GA	20,677	46	453	9%	1%
4	SC	12,587	78	162	5%	4%
5	MI	11,115	56	200	5%	1%
6	TN	10,326	50	207	4%	5%
7	OH	9,919	72	137	4%	3%
8	LA	9,520	29	328	4%	4%
9	VA	9,044	43	213	4%	2%
10	CA	8,610	95	91	4%	12%
11	AL	6,945	56	123	3%	5%
12	PA	6,891	67	103	3%	4%
13	CO	6,154	18	350	3%	-
14	WI	5,482	33	164	2%	-
15	KY	5,376	42	127	2%	1%
16	AZ	5,160	24	220	2%	3%
17	IN	5,040	37	135	2%	3%
18	KS	4,993	9	549	2%	-
19	IL	4,098	50	83	2%	4%
20	MD	3,644	22	166	2%	-
21	NY	3,579	40	91	2%	-
22	UT	3,503	27	131	1%	1%
23	WA	3,393	15	223	1%	-
24	MS	3,258	17	187	1%	1%
25	NM	3,200	8	421	1%	1%
26	FL	2,997	50	61	1%	2%
27	MO	2,757	27	101	1%	-
28	AR	2,074	24	88	1%	-
29	NJ	1,953	30	64	1%	2%
30	OK	1,865	5	352	1%	-
32	ID	1,093	14	80	0%	5%

Source: RI Master Data through 1H 2026, with 2026 annualized. Average Jobs/Case is based on adjusted totals and may not equal Jobs ÷ Cases. Idaho (ranked 32nd in 2025) is included because of its large 2026 increase.

The South Remains America's Manufacturing Leader

Regional patterns continue to reinforce the South's position as the nation's most competitive manufacturing region.

The **South*** accounted for more than 60 percent of announced reshoring and FDI jobs during 2025. Competitive operating costs, right-to-work policies, abundant industrial land, favorable logistics, aggressive economic development programs, and an increasingly complete manufacturing ecosystem continue to attract investment across a broad range of industries.

The **Midwest** remained a strong second, benefiting from its long-established automotive, machinery, and industrial manufacturing base. Early 2026 data suggest the West may temporarily overtake the Midwest, driven primarily by major semiconductor investments in Idaho together with continued expansion of High-Tech manufacturing in California.

The **Northeast** continues to attract important investments in pharmaceuticals, biotechnology, and specialized manufacturing but remains a comparatively smaller share of total announced manufacturing jobs.

The **West** moved to second place in 2026, due to very large announcements by Anduril Industries, Micron Technology, and Skydio.

*The South follows the U.S. Census Bureau definition: Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia, and the District of Columbia.

Exhibit 4.5 | **2025 Reshoring + FDI by U.S. Region**

Rank by Jobs	U.S. Region	Jobs Announced	Cases	Average Jobs/Case	% of Total Jobs
1	South	142,828	741	193	61%
2	Midwest	44,453	328	136	19%
3	West	32,585	213	153	14%
4	Northeast	14,421	183	79	6%

Exhibit 4.6 | **2026* Reshoring + FDI by U.S. Region**

Rank by Jobs	U.S. Region	Jobs Announced	Cases	Average Jobs/Case	% of Total Jobs
1	South	158,347	729	217	53%
2	West	66,731	159	420	23%
3	Midwest	44,716	327	137	15%
4	Northeast	26,719	166	161	9%

Source: RI Master Data through 1H 2026. 2026 is annualized.

Geographic Trends Point to a Diversified Manufacturing Economy Built on Strategic Alliances

Several broad geographic trends are becoming increasingly clear. Manufacturers continue to diversify production away from excessive dependence on any single foreign country and from geopolitical adversaries, particularly for strategically important products. Although nearshoring remains an attractive option for some industries, recent policy changes have placed greater emphasis on direct investment in the United States. At the same time, manufacturers continue to favor countries that offer competitive business costs, strong industrial ecosystems, skilled workforces, reliable infrastructure, access to major markets, and dependable political and trade relationships.

Together, these trends reinforce a broader conclusion of this report: manufacturing location decisions are becoming increasingly strategic. Companies are evaluating production locations not simply on labor costs, but on their ability to strengthen long-term competitiveness, resilience, and flexibility while reducing supply chain and geopolitical risk.

Chapter 5. Industrial Policy and Strategic Implications

Building a Competitive Manufacturing Economy

The data presented throughout this report point to a clear conclusion: reshoring and FDI are no longer temporary responses to supply chain disruptions or pandemic-era uncertainty. Instead, they have become integral components of a broader effort by companies to reduce risk and by the nation to rebuild America's manufacturing base.

The Trump administration has framed this objective as "reindustrializing America"—expanding domestic production while reducing dependence on imported manufactured goods. By that definition, reshoring and FDI are the primary mechanisms through which reindustrialization occurs and therefore provide meaningful measures of industrial policy effectiveness.

Although announced manufacturing investment remained remarkably resilient during 2025, the data also demonstrate that long-term success will depend on addressing the structural factors that continue to make U.S. manufacturing less cost-competitive than many foreign alternatives.

Lessons from the First Trump Administration

The first Trump administration demonstrated both the potential and the limitations of using tariffs and tax policy to stimulate domestic manufacturing.

Tax reform and regulatory changes initially encouraged significant increases in reshoring and FDI. However, the subsequent escalation of tariffs produced more mixed results. While tariffs successfully encouraged domestic production in certain industries, such as household appliances, many imports simply shifted from China to other low-cost countries rather than returning to the United States.

This experience illustrates that tariffs alone are a crude instrument to drive sustained reshoring. To maximize domestic manufacturing, trade policy must be integrated into a broader industrial strategy that improves the underlying competitiveness of U.S. manufacturing.

America's Greatest Competitive Advantage: Access to Its Market

The United States possesses a strategic advantage no other nation can fully match: access to the world's largest and most attractive consumer market. Manufacturers around the globe depend on American customers, giving the United States considerable leverage in determining where the goods sold here are produced.

That is precisely the leverage tariffs have exploited. By raising the cost of exporting into the United States, tariffs encourage companies to manufacture here instead. This use of market access can attract domestic investment, strengthen supply chains, expand manufacturing employment, and reduce dependence on foreign production.

Access to China's enormous consumer base was once a major reason U.S. companies invested there. Today, however, Chinese consumption is weak and China's population is declining. The United States faces its own long-term demographic challenges as population growth slows and other countries narrow the per-capita income gap. Expanding skilled immigration could help address workforce shortages while supporting the continued growth and attractiveness of the U.S. market. As global supply chains evolve, the combination of market access and industrial policy will remain one of America's most powerful tools for attracting manufacturing investment.

The Root Cause of Offshoring

The Reshoring Initiative's 2025 National Reshoring Survey reconfirmed that high manufacturing costs remain the primary driver of offshoring decisions.

Depending on the industry and source country, U.S. manufacturing costs are typically 10% to 50% higher than those in competing foreign locations. The Reshoring Initiative believes the principal cause of this disadvantage is an overvalued U.S. dollar—approximately 10% against the currencies of most developed countries and as much as 50% against China and other low-wage countries.

Tariffs, incentives, and geopolitical concerns influence investment decisions and make domestic production more attractive. Long-term reshoring success, however, ultimately depends on narrowing the underlying cost gap between U.S. and offshore manufacturing.

Building a Durable Industrial Policy

The data presented throughout this report and from the National Reshoring Survey suggest that successful industrial policy should focus on improving long-term U.S. manufacturing competitiveness rather than relying primarily on temporary incentives. The Reshoring Initiative believes five priorities deserve particular attention.

Workforce Development

The shortage of skilled manufacturing workers remains one of the greatest long-term constraints on domestic manufacturing growth.

Closing the nation's trade deficit through increased domestic production will require substantial expansion of apprenticeships, engineering education, technical training, and skilled immigration. Workforce investments should be viewed as economic infrastructure comparable to investments in transportation or energy. A key step is for national, state, and local governments to shift from a "college for all" philosophy to "a good career for all."

Manufacturing Cost Competitiveness

Reducing the structural cost disadvantage facing U.S. manufacturers is essential. The first priority should be addressing the root cause by lowering the value of the U.S. dollar. Other important measures include preserving immediate capital expensing and expanding the corporate use of Total Cost of Ownership analysis to capture the hidden costs and risks of offshoring.

Smart Trade Policy

Tariffs can influence investment decisions by encouraging domestic production. However, they are most effective when implemented as part of a broader industrial strategy rather than as a stand-alone policy.

To maximize domestic manufacturing, trade policy should encourage long-term domestic investment while minimizing opportunities for production simply to relocate from one foreign country to another.

Automation and Productivity

Persistent workforce shortages make productivity growth increasingly important to U.S. manufacturing competitiveness. Automation should be viewed primarily as a way to help existing workers produce more—not primarily as a means of replacing them.

Higher productivity can offset labor shortages, support wage growth, narrow international cost differences, and make more reshoring projects economically viable. Investments in advanced equipment, digital technologies, and worker training should therefore be central components of a successful reshoring strategy.

U.S. manufacturing labor productivity has been essentially flat since 2010, while China's productivity has soared. China's rapid growth in output required and funded new facilities and automation, resulting in China's physical output per worker in select industries, such as steel and EVs, now being 2 to 3 times the U.S. level. In contrast, U.S. output has been flat and too many of our factories are outdated. Reshoring starts a virtuous spiral with increased output funding productivity improvements that make costs more competitive.

Long-Term Policy Stability

Perhaps most importantly, manufacturers need policy stability. Major manufacturing investments often involve billions of dollars and planning horizons measured in decades rather than election cycles.

A clear, consistent, and durable industrial policy gives companies the confidence to invest in new facilities, equipment, supply chains, and workforce development within the United States.

Chapter 6. National Reshoring Survey Insights

What Manufacturers Say

The Reshoring Initiative database documents what companies have announced and done. The National Reshoring Survey, developed with Regions Recruiting®, provides additional private insight into how manufacturers evaluate sourcing decisions before those decisions become public.

Together, these two datasets provide a more complete picture of the forces shaping U.S. manufacturing. The following sections highlight key findings from the 2025 and 2026 National Reshoring Surveys.

2025 National Reshoring Survey Highlights

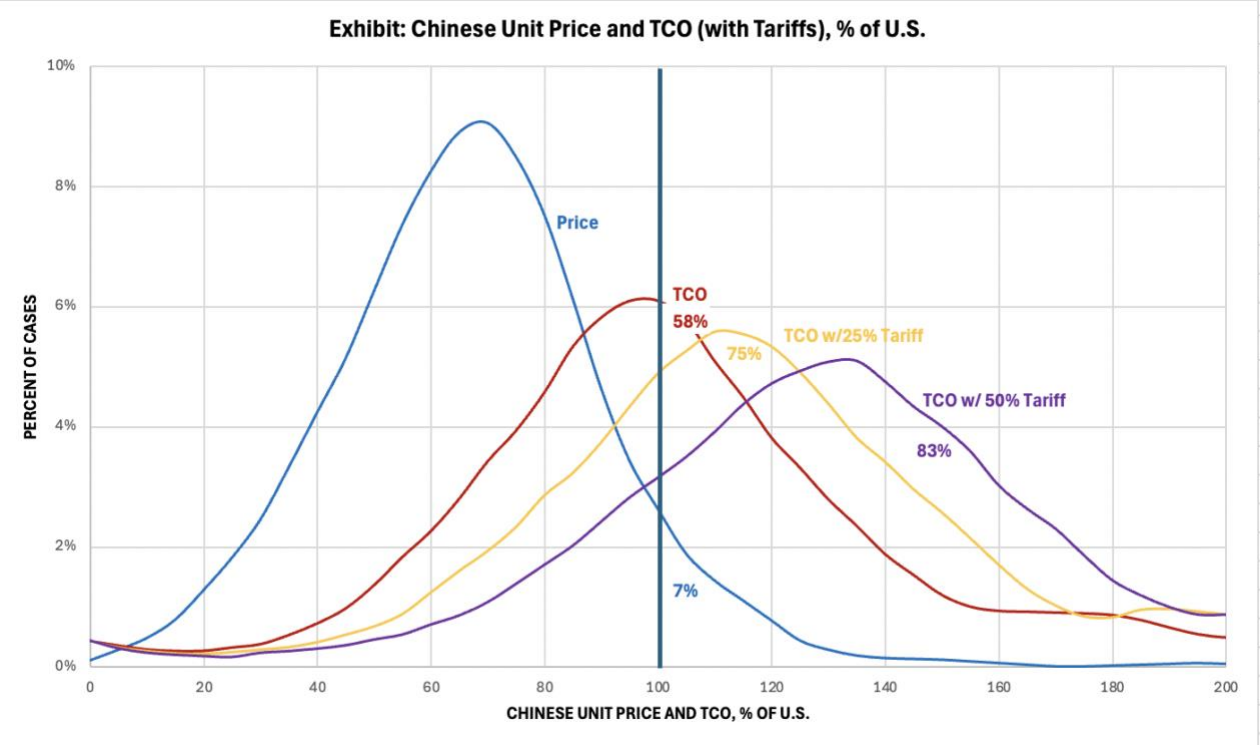
- **Cost Still Drives Most Decisions**

Despite growing concern over geopolitical risk and supply chain resilience, cost remains the dominant driver of offshoring decisions.

Many manufacturers continue to rely on Ex-Works or Landed Cost calculations that fail to capture inventory costs, quality issues, supply chain risk, balance sheet impacts, and other hidden costs.

The Reshoring Initiative estimates that universal adoption of Total Cost of Ownership for sourcing and siting decisions could support approximately $200 billion per year in additional domestic manufacturing and one million manufacturing employees without requiring government subsidies, tariffs, or currency action. Exhibit 6.1 shows that the U.S. win rate vs. China goes from 7% based on price, to 58% based on TCO, to 75% based on TCO plus a 25% tariff and 83% based on TCO plus a 50% tariff.

Exhibit 6.1 | **Chinese Price and TCO, % of U.S.**



How to read Exhibit 6.1: Each curve shows TCO Estimator users' China-vs.-U.S. comparisons, plotted by Chinese cost as a percentage of U.S. cost: blue for price only, red for TCO, yellow for TCO plus a 25% tariff, and purple for TCO plus a 50% tariff. Cases to the right of the 100% line are ones where the U.S. is cheaper. Source: RI TCO Estimator user data.

- ## Workforce Has Become a Strategic Necessity

Survey respondents consistently ranked workforce quality and quantity above many issues receiving greater public attention, including tariffs, taxes, and regulation. Other advantages of developing a strong, skilled workforce include reduced societal cost relative to attending universities and millions of additional workers between the ages of 18 and 23.

- ## Speed Is Increasingly Worth Paying For

Many original equipment manufacturers (OEMs) reported a willingness to pay significantly more for components that could be delivered five weeks sooner.

This finding demonstrates that shorter supply chains provide value extending well beyond transportation costs by reducing inventory requirements, improving responsiveness, and increasing customer satisfaction.

- ## Engineering Drives Manufacturing

OEMs consistently placed greater emphasis than contract manufacturers on locating engineering functions close to production.

As products become more technologically sophisticated, close collaboration between engineering and manufacturing is becoming an increasingly important competitive advantage. Co-location accelerates problem-solving, strengthens innovation, improves manufacturability, and shortens the path from product development to full-scale production. However, reductions in federal funding for university research could weaken this critical synergy by constraining the research and talent pipelines that support advanced U.S. manufacturing.

- ## Geopolitical Risk Continues to Rise

Survey respondents expressed significant concern regarding geopolitical disruptions, particularly involving China and Taiwan.

However, the survey also reveals a gap between concern and action. While many manufacturers acknowledge geopolitical risks, relatively few have yet developed comprehensive reshoring strategies to reduce those risks.

- **Opportunities for Contract Manufacturers**

The survey identifies substantial opportunities for domestic contract manufacturers.

OEMs increasingly value faster delivery, engineering collaboration, reduced geopolitical risk, and improved responsiveness—all competitive advantages that domestic suppliers can offer relative to offshore competitors.

2026 National Reshoring Survey Highlights

The 2026 survey had 249 respondents (118 OEMs, 131 contract manufacturers [CMs]) and shows reshoring gaining momentum. More OEMs are reshoring than in 2025, and 63% plan U.S. capital investment. The share of CMs quoting reshoring work doubled to 32%. Geopolitical risk now rivals tariffs as a driver, and OEM use of TCO rose from 30% to 40%. Headwinds remain: 57% cite policy uncertainty as their top challenge, skilled labor is scarce, and OEM satisfaction with results fell from 96% to 65%.

Conclusion

Reshoring Has Become a Long-Term Strategy

The data presented in this report demonstrate that reshoring and FDI remained remarkably resilient throughout 2025 despite considerable economic uncertainty, evolving trade policy, and heightened geopolitical risk.

More important, the findings suggest that reshoring has matured beyond a temporary response to extraordinary events. Manufacturers increasingly recognize that resilient supply chains, advanced manufacturing ecosystems, customer proximity, workforce quality, tariffs, and geopolitical stability create lasting competitive advantages that frequently outweigh lower offshore prices.

Looking ahead, the outlook remains favorable. Early 2026 data point toward higher manufacturing investment, while numerous announced projects remain contingent upon greater policy certainty. Advances in automation, materials processing, and energy technology further strengthen the long-term outlook for competitive U.S. production. If manufacturers continue to gain confidence in the long-term policy environment, a higher wave of reshoring and FDI appears likely. The reshoring and FDI wave will create a virtuous spiral: increased production drives capacity utilization, investment, and productivity, reversing 50 years of decline.

Ultimately, rebuilding America's manufacturing base will require more than temporary incentives or isolated policy changes. Sustained success will depend on creating an environment in which producing in the U.S. for the U.S. is consistently the most competitive long-term business decision.

Methodology

Unless otherwise noted, all statistics, charts, and analyses presented in this report are derived from the Reshoring Initiative's proprietary Reshoring Library and Master Data. The database contains more than 8,000 reshoring and FDI cases compiled from over 14,000 published articles, company announcements, government sources, privately submitted case studies, and other verified references.

Cases are included in the database only when a specific company, product category, and U.S. production location can be identified through reliable documentation.

Throughout the report, **announced manufacturing jobs** are used as the primary metric because they provide the clearest measure of the long-term economic impact of reshoring and FDI.

Reported job totals include work brought into OEM manufacturing facilities as well as production outsourced to domestic suppliers, recognizing that the supply chain frequently generates more employment than final assembly.

Because many companies do not publicly announce or provide job numbers for every reshoring or FDI project, reported totals are adjusted to account for estimated underreporting, particularly among suppliers and smaller manufacturers. Since not every case has all data points, totals may vary slightly between exhibits depending on data availability and reporting criteria.

Unless otherwise noted, data reflect the Reshoring Initiative Master Data through the first half of 2026. All values identified as **2026*** represent year-end projections based on data available as of June 30, 2026.

Definitions of Reshoring and Foreign Direct Investment (FDI)

The Reshoring Initiative classifies every case as either **Reshoring** or **Foreign Direct Investment (FDI)** using consistent definitions and review criteria.

FDI includes new or expanded U.S. manufacturing by companies whose global headquarters are located outside the United States. Cases are classified according to company ownership at the time of the announcement.

Reshoring includes new or expanded U.S. manufacturing by companies whose global headquarters are located inside the United States and either:

- The company explicitly states it is localizing production or supply chains to the United States; or

- The project increases domestic production in industries with historically high import dependence (80+%), where new U.S. production will replace imported goods ("import substitution reshoring"); or
- The company's products have been identified by the U.S. government as essential products to be reshored ("critical products").

For critical industries identified by the U.S. government—including semiconductors, pharmaceuticals, rare earth materials, EV batteries, steel, and aluminum—the import-dependence threshold of 80% is not required because the U.S. government has determined that expanding domestic production directly strengthens national supply chain resilience in critical areas.

Complete definitions and classification methodology are available at RI Definitions of Reshoring and FDI.

About the Reshoring Initiative

Since 2010, the Reshoring Initiative has worked to strengthen U.S. manufacturing by helping companies make informed sourcing decisions based on total cost, risk, and long-term competitiveness rather than purchase price alone.

Through its proprietary manufacturing database, Total Cost of Ownership Estimator®, National Reshoring Survey, and other analytical tools, the Reshoring Initiative provides manufacturers, economic developers, policymakers, investors, and researchers with the information needed to understand and accelerate the reshoring of U.S. manufacturing.

Contact Us

Ready to accelerate your reshoring strategy?

Whether you are evaluating sourcing options, developing an industrial strategy, researching manufacturing trends, or looking for new business opportunities, the Reshoring Initiative can help. Please get in touch with us to learn how to advance reshoring for your company, your region, and the nation. Email **info@reshorenow.org**. Phone 847-867-1144.

Support Our Mission

The Reshoring Initiative is a nonprofit organization dedicated to strengthening U.S. manufacturing. Whether through a donation, sponsorship, collaboration, or by utilizing our

data and services, your support helps us continue producing the research, tools, and analysis that advance reshoring across the United States.

Reshoring Initiative Resources

Reshoring Initiative Master Data – Access over 8,100 reshoring and FDI cases representing more than 2.8 million announced U.S. manufacturing jobs since 2010. Analyze company investment decisions, industry trends, geographic patterns, source countries, incentives, and job creation data to identify opportunities before your competitors. Trusted by financial asset managers, manufacturers, consultants, academics, and policymakers seeking actionable intelligence on the future of U.S. manufacturing.

Total Cost of Ownership Estimator® – Free online tool helps companies account for all relevant factors — overhead, balance sheet, risks, corporate strategy, green and other external and internal business considerations — to determine the true total cost of ownership. It can be used by companies to make smarter sourcing decisions and to sell against imports. TCO Estimator user data show that 20 to 30% of imported products can be made here more profitably. Call on the Reshoring Initiative for help using this and other tools.

Geopolitical Risk Report – This report provides a probability-based measure of geopolitical risk and supporting analysis to help organizations assess country-specific risk exposure. The Geopolitical Risk Probability (GRP) estimates the likelihood that a major geopolitical event will disrupt trade and halt or significantly reduce exports from a country to the United States within the next year.

National Reshoring Survey – Unique survey of the reshoring actions and decision factors of OEMs and contract manufacturers. Joint project with Regions Recruiting.

Import Substitution Program (ISP) – Manufacturers identify the products they excel at. ISP identifies and qualifies the major relevant importers of those products. The manufacturers then use TCO to convince the importers to reshore. Offered directly to manufacturers and through MEPs, EDOs (economic development organizations), trade associations, and equipment sellers.

Competitiveness Toolkit – Designed to quantify and select the optimal national policy changes to bring back a desired number of jobs.

Reshoring Library – You can use Advanced Search to identify companies that have reshored or done FDI in relevant industries or regions. Search for potential customers.

Reshoring Initiative Data Report – Annual and semi-annual reports track the drivers, impact, and momentum of the trend.

The 9-Step Roadmap to Reshoring Success – An outline of how a company should evaluate and implement reshoring.

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About Us

Reshoring is gaining momentum throughout the country. Many companies have already repatriated some of their manufacturing, and the Reshoring Initiative is continuing to spread the “return-manufacturing-home” message to help other manufacturers realize America is an advantageous place to produce goods.
The Reshoring Initiative, founded in early 2010, takes action by helping manufacturers realize that local sourcing, in many cases, reduces their total cost of ownership of production and of purchased parts and tooling. The Initiative also trains suppliers on how to effectively meet the needs of their local customers, giving suppliers the tools to win against lower-priced offshore competitors.

Reshoring Initiative®

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