Manufacturing location factsheets

EY ILAS - FY27

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The better the answer.
The better the world works.

EY
Shape the future with confidence

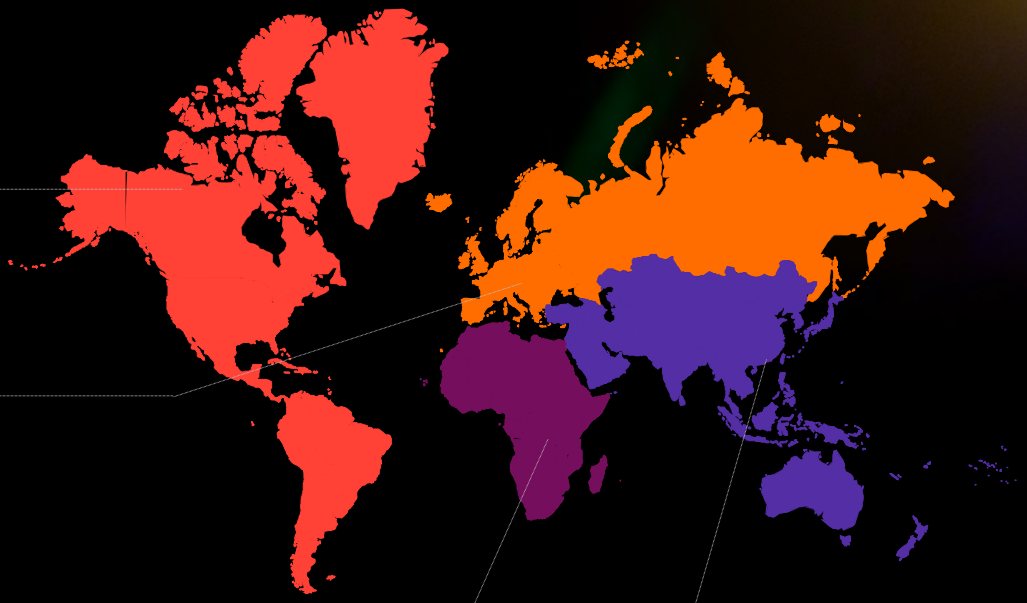
Foreword

Volatility is redefining where and how the world manufactures

Fabrice Reynaud
EY ILAS, EMEIA Leader
Ernst & Young Advisory

Morgan Malone
Partner, Transformative Manufacturing Leader
Ernst & Young LLP

> “Persistent geopolitical volatility, capital uncertainty and structural talent constraints are converging to fundamentally reshape manufacturing footprints, investment choices and operating models worldwide.



Americas

Manufacturing in the Americas is driven by US reshoring and artificial intelligence (AI)-enabled automation, while Latin America benefits from nearshoring and Canada focuses on data-center components.

Europe

Europe’s manufacturing is slowly recovering, with growth driven by high-tech, electrification and automation while firms prioritize resilience through digitalization and AI despite energy and skills pressures.

Africa

Africa’s manufacturing is gaining momentum, supported by AfCFTA, infrastructure upgrades, and rising demand, with East and West Africa leading growth despite persistent constraints.

Asia-Pacific

Asia-Pacific manufacturing is increasingly driven by AI, resilient supply chains and sustainability, accelerating the rollout of highly automated “dark factories” with minimal on-site labor.

Manufacturing and operating models are being structurally reshaped by **sustained geopolitical volatility**, trade fragmentation and regulatory divergence. The traditional reliance on **single-country offshoring** is increasingly seen as a **concentration risk** rather than a source of efficiency. In response, organizations are redesigning their industrial footprints around diversified **multi-shoring strategies** that balance **cost, resilience, sustainability** and **market access.**

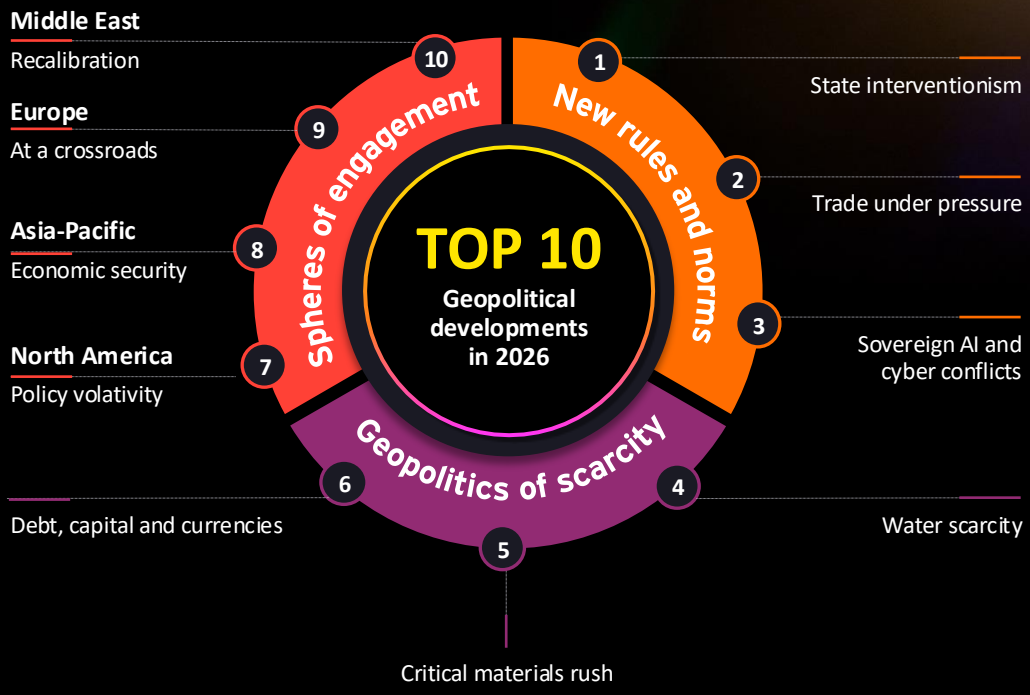
Uncertainty is also transforming **capital allocation.** Large, irreversible **greenfield investments** are giving way to more **modular** and **reversible approaches,** with a strong preference for brownfield upgrades, phased capacity additions and as-a-service models that shift **CAPEX toward OPEX.** At the same time, structural shortages in **automation, maintenance and operational technology skills** are accelerating the adoption of **robots** and **agentic AI,** not only to offset **workforce constraints** but to stabilize operations and enable real-time, end-to-end optimization across the **value chain.**

Introduction

From episodic disruptions to a geostrategic operating environment

Famke Krumbmüller
Leader of EY Geostrategic Business Group (GBG)
EY-Parthenon EMEIA Geostrategic Business Group Leader

> “Geopolitical dynamics have shifted from sporadic shocks to persistent, system-level forces that directly shape cost, business continuity, sustainability and market access.



Source: EY-Parthenon 2026 Geostrategic Outlook

Nearly **75% of CEOs** are either **localizing** or have localized some part of their production **within the country of sale,** according to the September edition of the EY-Parthenon CEO Outlook. Just over half are reorganizing **supply chains** to serve a particular **regional bloc.** These strategic shifts demonstrate how geopolitics is fundamentally changing the **global operating environment.**

We expect **geopolitical volatility** to persist in 2026. There will be many underlying drivers of these and other developments, but the role of the US in reshaping the global operating environment in 2026 will be highly significant.

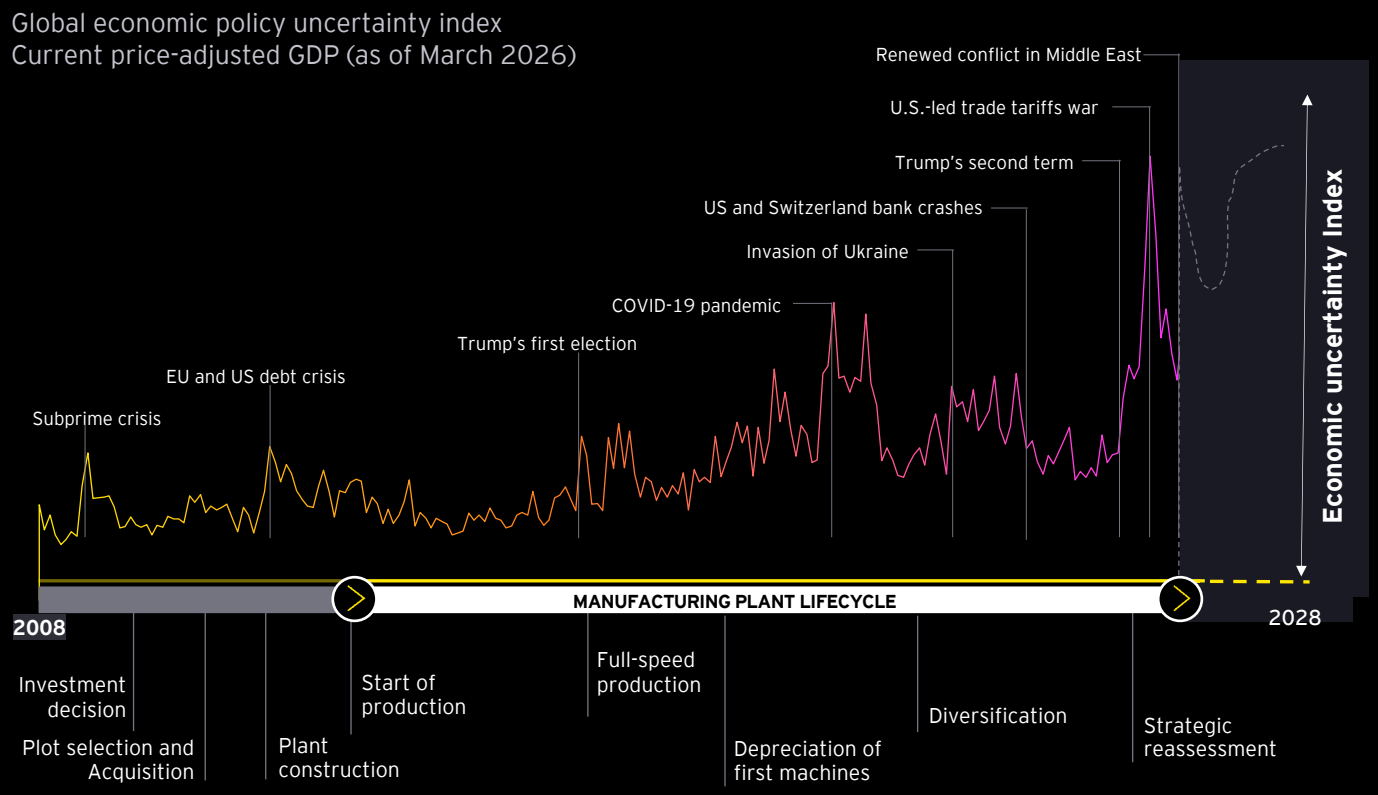
As China, the EU and other actors react and adapt to this new US posture throughout 2026, while continuing to shape their own agendas, the global operating environment will continue to evolve.

This will pose both **challenges and opportunities** for organizations around the world, influencing how executives manage **risks**, govern their organizations and set **strategy**. As in past years, the 2026 Geostrategic Outlook is designed to enable executives to incorporate **geopolitical analysis** into the decisions they make about these and other aspects of their business.

Volatility now outpaces the economics behind long-lived manufacturing assets

Most manufacturing footprints were designed for efficiency and scale, not for continuous geopolitical surveillance or rapid reconfiguration, leaving leaders blind to emerging risks and forced into reactive, value destructive moves.

Slow-moving assets designed for permanence in an era of increasing volatility



Limited reversibility

Beyond financial inertia, manufacturing assets are deeply embedded in local ecosystems. Dependence on supplier networks, logistics infrastructure, workforce capabilities, and regulatory environments anchors production geographically, making rapid reconfiguration both operationally and economically challenging.

Long timelines

Building a new manufacturing facility typically takes two to six years. These extended investment cycles are inherently misaligned with geopolitical shocks, which can emerge and escalate within months.

High capital intensity

Manufacturing systems require substantial upfront investment in plants, machinery, and infrastructure. These high sunk costs create significant barriers to relocation when geopolitical conditions shift.

Make footprint strategy a continuous, trigger-based capability

Resilient footprints are built through continuous monitoring, dynamic forward-looking analysis, and rapid response mechanisms that help organizations anticipate disruptions, adapt to changing conditions, and sustain operational stability.

Turning geopolitical uncertainty into actionable levers to guide location strategy

1

Monitor locations

Track what matters

How to get real-time visibility on footprint's environment?

Gain real-time visibility on costs, talent, infrastructure, and regulations to stay ahead of risks and opportunities.

2

Optimize footprint

Read more

3

Define playbook

Read more

Enable fast, informed decision-making through the EY ILAS Location Tool®

Cross-country location criteria comparison

The EY proprietary data visualization tool enables comprehensive cross-country comparisons of location criteria for future investment decisions.

Labor cost forecast

AI-driven solution to project labor cost trajectories and quantify risk exposure under different macroeconomic scenarios.

Watch the video

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Read more

2

Optimize footprint

Enhance resilience

How to strengthen location footprint in the current state?

Regularly model how shocks could reprice the footprint and quantify the impact on P&L, operations, and service levels. Use these insights to rebalance and reinforce resilience.

3

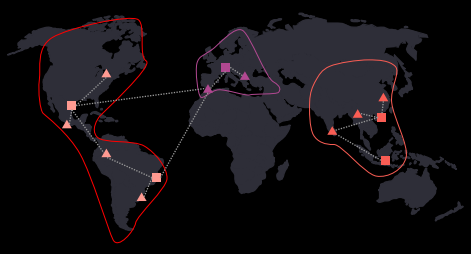
Define playbook

Read more

Develop alternative footprint options to enhance resilience and drive future growth

Current footprint

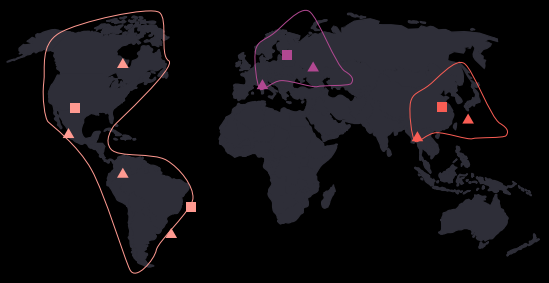
Current manufacturing footprint inherited by organic growth and M&A activity



Competitiveness	Sustainability	Resilience
5.3€/MT	5.3T	78
Landed cost per unit	Total CO_2 emissions	Averaged resilience score

Optimization

Concentration of activities



Competitiveness	Sustainability	Resilience
-15%	-20%	79
Landed cost per unit	Total CO_2 emissions	Averaged resilience score

Make footprint strategy a continuous, trigger-based capability

Resilient footprints are built through continuous monitoring, dynamic forward-looking analysis, and rapid response mechanisms that help organizations anticipate disruptions, adapt to changing conditions, and sustain operational stability.

Turning geopolitical uncertainty into actionable levers to guide location strategy

1

Monitor locations

Read more

2

Optimize footprint

Read more

3

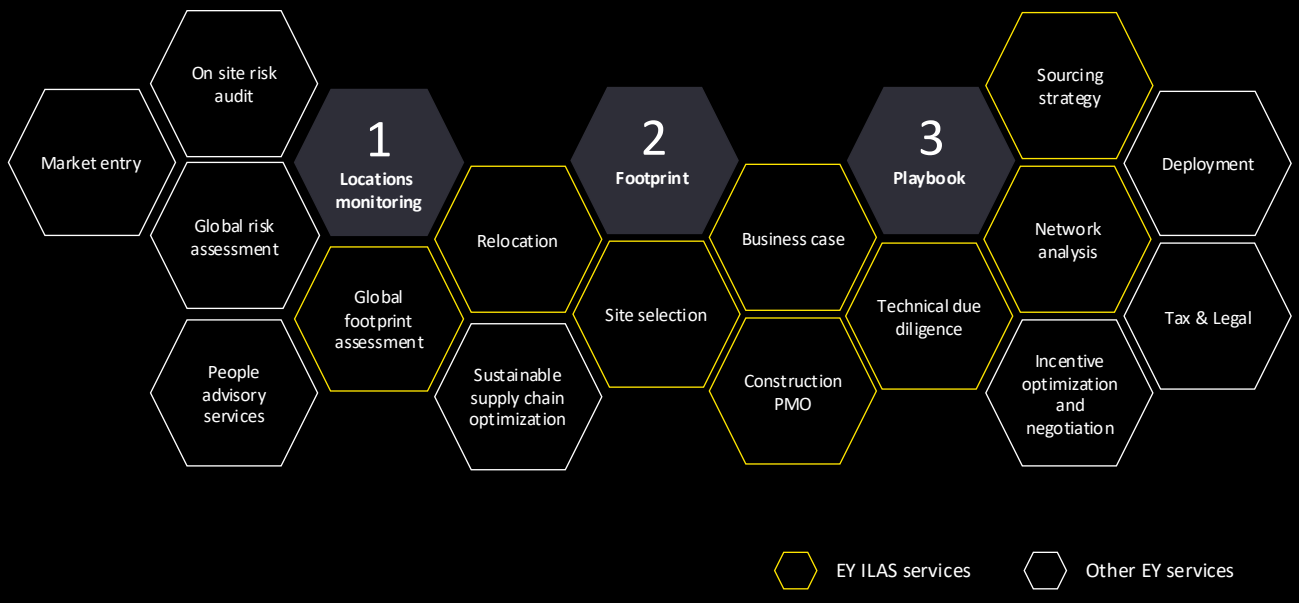
Define playbook

Act fast

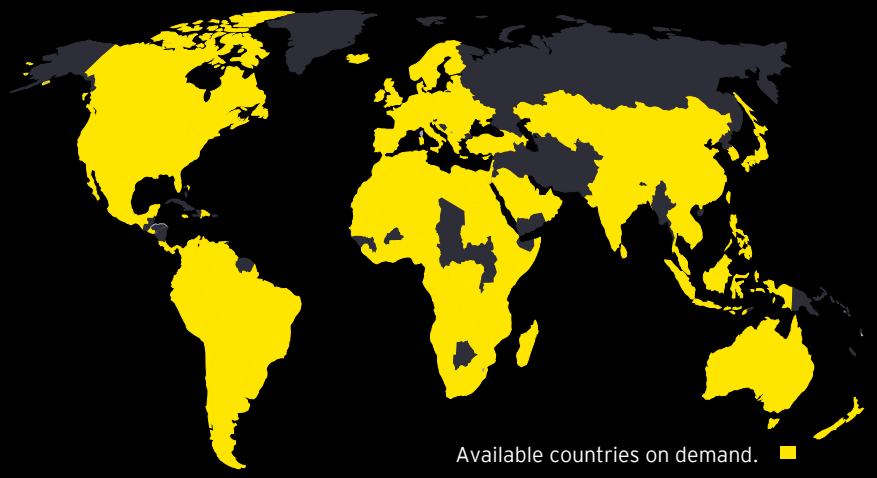
How to act when a scenario materializes?

Enable rapid decision-making by establishing predefined response plans triggered by concrete geopolitical events, ensuring swift and coordinated execution.

Building your location strategy with EY ILAS, integrated into a vast services network



A curated library of manufacturing country scans across 100+ markets, readily accessible, with a sample shown here.



Africa	Egypt
	Nigeria
	South Africa
Americas	Brazil
	Mexico
	US
Asia	Japan
	Malaysia
	Thailand
Europe	France
	Hungary
	Lithuania
	Netherlands
	Spain
	Turkey

Additional country scans available upon request by contacting the EY ILAS team

Africa

Egypt

Population

Total population	120.1M
Working population	62.6%
Share of manufacturing workers	12.6%
Unemployment rate	7.4%

Business environment

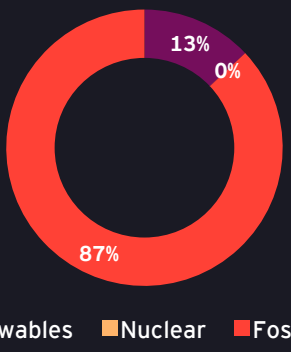
Openness to FDI rank *(/140) - 2024*	90th
Corruption rank *(/180)*	130th
Corporate income tax rate	22.5%
Inflation	28.4%

Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€4,200
	Manufacturing engineer	€9,900
Social security rate for companies		20.0%
Construction cost level[2] *(high/ medium/ low)*		Low

Energy mix

Share of energy used in electricity capacity



Energy production

Average annual electricity spot market price *(€/kWh)*	0.0
Energy dependency ratio *(energy generation - energy consumption) - 2024*	24.5%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Africa

Nigeria

Population

Total population	242.4M
Working population	55.5%
Share of manufacturing workers	14.4%
Unemployment rate	4.8%

Business environment

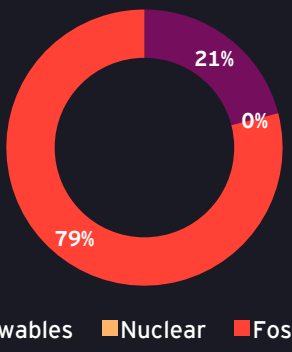
Openness to FDI rank *(/140) - 2024*	91st
Corruption rank *(/180)*	142nd
Corporate income tax rate	30.0%
Inflation	33.2%

Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€1,400
	Manufacturing engineer	€2,100
Social security rate for companies		12.0%
Construction cost level[2] *(high/ medium/ low)*		Low

Energy mix

Share of energy used in electricity capacity



Energy production

Average annual electricity spot market price *(€/kWh)*	0.0
Energy dependency ratio *(energy generation - energy consumption) - 2024*	-91.3%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Africa

South Africa

Population

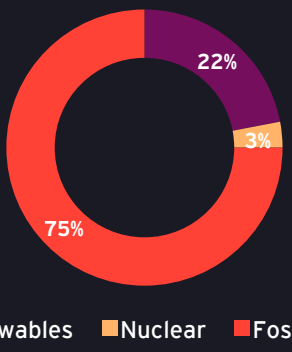
Total population	65.5m
Working population	67.4%
Share of manufacturing workers	8.1%
Unemployment rate	32.7%

Business environment

Openness to FDI rank *(/140) - 2024*	32nd
Corruption rank *(/180)*	81st
Corporate income tax rate	27.0%
Inflation	4.5%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€15,100
	Manufacturing engineer	€49,400
Social security rate for companies		2.2%
Construction cost level[2] *(high/ medium/ low)*		Low

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	-6.8%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Americas

Brazil

Population

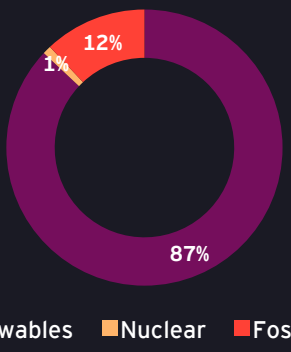
Total population	213.6m
Working population	69.4%
Share of manufacturing workers	11.6%
Unemployment rate	7.1%

Business environment

Openness to FDI rank *(/140) - 2024*	48th
Corruption rank *(/180)*	107th
Corporate income tax rate	34.0%
Inflation	4.4%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€14,400
	Manufacturing engineer	€45,300
Social security rate for companies		35.3%
Construction cost level[2] *(high/ medium/ low)*		Medium

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	-13.5%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Americas

Mexico

Population

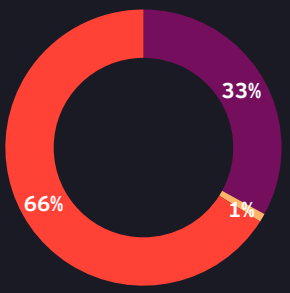
Total population	133.0m
Working population	67.1%
Share of manufacturing workers	16.9%
Unemployment rate	2.9%

Business environment

Openness to FDI rank *(/140) - 2024*	71st
Corruption rank *(/180)*	141st
Corporate income tax rate	30.0%
Inflation	4.7%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€13,700
	Manufacturing engineer	€41,000
Social security rate for companies		27.0%
Construction cost level[2] *(high/ medium/ low)*		Medium

Energy production

Average annual electricity spot market price *(€/kWh)*	0.2
Energy dependency ratio *(energy generation - energy consumption) - 2024*	17.7%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Americas

US

Population

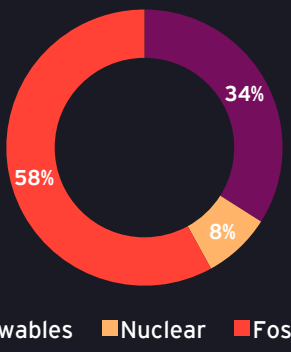
Total population	349.0m
Working population	65.0%
Share of manufacturing workers	10.0%
Unemployment rate	4.2%

Business environment

Openness to FDI rank *(/140) - 2024*	43rd
Corruption rank *(/180)*	29th
Corporate income tax rate	21.0%
Inflation	3.0%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€34,100
	Manufacturing engineer	€72,800
Social security rate for companies		16.6%
Construction cost level[2] *(high/ medium/ low)*		High

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	-12.2%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Asia

Japan

Population

Total population	122.4m
Working population	58.9%
Share of manufacturing workers	15.9%
Unemployment rate	2.6%

Business environment

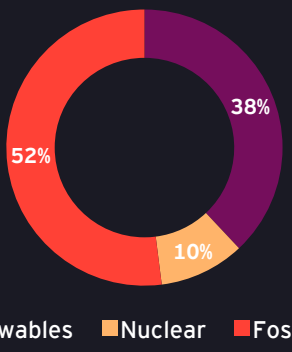
Openness to FDI rank *(/140) - 2024*	42nd
Corruption rank *(/180)*	18th
Corporate income tax rate	30.6%
Inflation	2.7%

Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€34,100
	Manufacturing engineer	€72,800
Social security rate for companies		16.6%
Construction cost level[2] *(high/ medium/ low)*		High

Energy mix

Share of energy used in electricity capacity



Energy production

Average annual electricity spot market price *(€/kWh)*	0.2
Energy dependency ratio *(energy generation - energy consumption) - 2024*	83.4%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Asia

Malaysia

Population

Total population	36.4m
Working population	70.3%
Share of manufacturing workers	16.6%
Unemployment rate	3.0%

Business environment

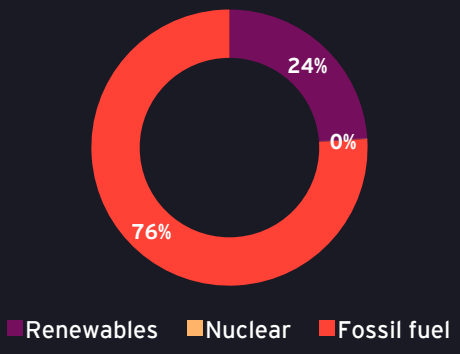
Openness to FDI rank *(/140) - 2024*	96th
Corruption rank *(/180)*	57th
Corporate income tax rate	24.0%
Inflation	1.83%

Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€14,700
	Manufacturing engineer	€38,800
Social security rate for companies		20.5%
Construction cost level[2] *(high/ medium/ low)*		Low

Energy mix

Share of energy used in electricity capacity



Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	3.0%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Asia

Thailand

Population

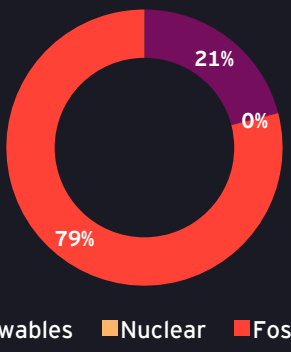
Total population	71.6m
Working population	70.2%
Share of manufacturing workers	16.0%
Unemployment rate	1.0%

Business environment

Openness to FDI rank *(/140) - 2024*	89th
Corruption rank *(/180)*	107th
Corporate income tax rate	20.0%
Inflation	0.4%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€12,100
	Manufacturing engineer	€35,300
Social security rate for companies		7.3%
Construction cost level[2] *(high/ medium/ low)*		Low

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	52.4%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Europe

France

Population

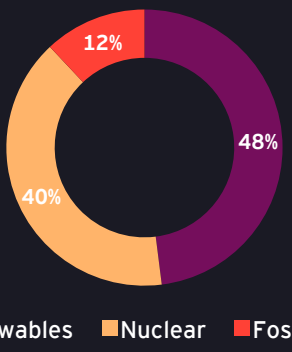
Total population	66.7m
Working population	61.5%
Share of manufacturing workers	11.2%
Unemployment rate	7.6%

Business environment

Openness to FDI rank *(/140) - 2024*	24th
Corruption rank *(/180)*	27th
Corporate income tax rate	25.0%
Inflation	2.0%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€57,800
	Manufacturing engineer	€111,800
Social security rate for companies		45.0%
Construction cost level[2] *(high/ medium/ low)*		High

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	39.9%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Europe

Hungary

Population

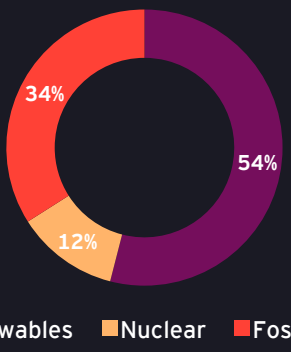
Total population	9.6m
Working population	64.7%
Share of manufacturing workers	20.9%
Unemployment rate	4.3%

Business environment

Openness to FDI rank *(/140) - 2024*	26th
Corruption rank *(/180)*	84th
Corporate income tax rate	9.0%
Inflation	3.8%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€20,800
	Manufacturing engineer	€44,800
Social security rate for companies		13.0%
Construction cost level[2] *(high/ medium/ low)*		0

Energy production

Average annual electricity spot market price *(€/kWh)*	0.3
Energy dependency ratio *(energy generation - energy consumption) - 2024*	

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Europe

Lithuania

Population

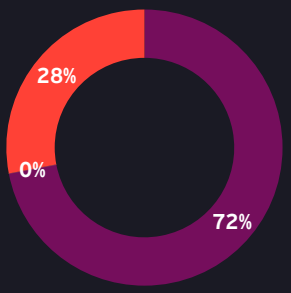
Total population	2.8m
Working population	65.3%
Share of manufacturing workers	15.9%
Unemployment rate	6.6%

Business environment

Openness to FDI rank *(/140) - 2024*	18th
Corruption rank *(/180)*	28th
Corporate income tax rate	16.0%
Inflation	0.7%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€23,000
	Manufacturing engineer	€41,500
Social security rate for companies		1.8%
Construction cost level[2] *(high/ medium/ low)*		Medium

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	40.0%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Europe

Netherlands

Population

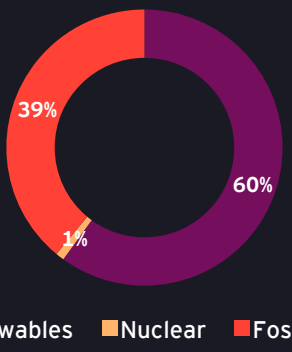
Total population	18.4m
Working population	64.7%
Share of manufacturing workers	8.5%
Unemployment rate	3.8%

Business environment

Openness to FDI rank *(/140) - 2024*	9th
Corruption rank *(/180)*	8th
Corporate income tax rate	25.8%
Inflation	3.3%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€68,400
	Manufacturing engineer	€121,300
Social security rate for companies		34.0%
Construction cost level[2] *(high/ medium/ low)*		High

Energy production

Average annual electricity spot market price *(€/kWh)*	0.2
Energy dependency ratio *(energy generation - energy consumption) - 2024*	68.9%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Europe

Spain

Population

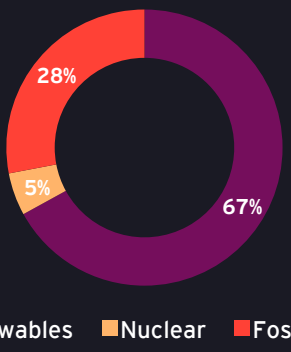
Total population	47.9m
Working population	66.1%
Share of manufacturing workers	12.0%
Unemployment rate	10.8%

Business environment

Openness to FDI rank *(/140) - 2024*	11th
Corruption rank *(/180)*	49th
Corporate income tax rate	25.0%
Inflation	2.8%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€48,400
	Manufacturing engineer	€96,900
Social security rate for companies		
Construction cost level[2] *(high/ medium/ low)*		Medium

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	67.0%

2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

Europe

Turkey

Population

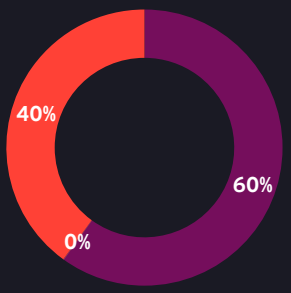
Total population	87.9m
Working population	68.2%
Share of manufacturing workers	19.8%
Unemployment rate	8.3%

Business environment

Openness to FDI rank *(/140) - 2024*	64th
Corruption rank *(/180)*	124th
Corporate income tax rate	25.0%
Inflation	60.0%

Energy mix

Share of energy used in electricity capacity



Costs

Annual fully loaded salary[1] *(€)*	Machine operator	€18,300
	Manufacturing engineer	€35,000
Social security rate for companies		22.8%
Construction cost level[2] *(high/ medium/ low)*		Low

Energy production

Average annual electricity spot market price *(€/kWh)*	0.1
Energy dependency ratio *(energy generation - energy consumption) - 2024*	66.3%

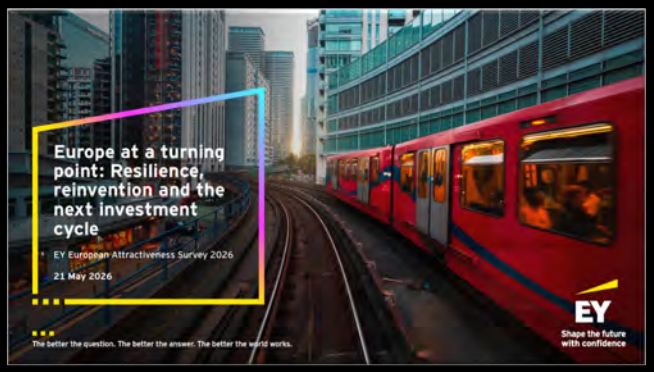
2025 data

[1] *Includes mandatory employer social security contributions, excluding benefits.*
[2] *The scale is built from approximated construction costs per sqm (Low: <€1,000/sqm | Medium: 1,000 to 2,000 €/sqm | High: > 2,000 €/sqm)*

EMEIA Center of Excellence

EY International Location Advisory Service (ILAS)

EY ILAS thought leadership



Recent EY ILAS footprint optimization and site selection references

ACC	ESI	Nissan
Alexion	Exact Sciences	Nokia
Allianz	Fujitsu	Porsche
Alten	G2Ocean	Quest Diagnostics
Altran	GE	Rio Tinto
Atos	Geodis	Rocket Software
Bayer	Goodyear	Sagemcom
Bloom Biorenewables	Haier	Scor
BP	Johnson & Johnson	Sixt
Bupa	Johnson Matthey	SKF
Canon	Kantar	Technicolor
Carrefour	Labcorp	Thermofisher
Carrier	Linxens	Toll
Coca-Cola	McKesson	Toyota
Colgate	Michelin	Unilever
Cummins	Midea	Winkelmann
Daimler Truck	Morgan Stanley	XPO Logistics
Dentsu	Natixis	Zelis

EY ILAS credentials

1

Monitor locations

French tire company

Global footprint monitoring across Asia, Europe, and the Americas

Objective

Assess the manufacturing footprint to guide long-term production allocation based on talent, cost, and risk dynamics.

Approach

Integrated people and energy analysis at country and site level to evaluate growth potential and constraints under varying macroeconomic scenarios and identifying sites with expansion potential or exposure to structural constraints.

Outcome

Segmented countries into strategic clusters to prioritize investment and volume allocation, informing a footprint roadmap through 2050 with dynamic monitoring of labor and energy costs.

2

Optimize footprint

Biotechnology startup

First industrial site location in Europe

Objective

Support a European biotech startup in selecting its first industrial site to ensure operational resilience and strengthen investor confidence, based on cost, biomass access, chemical infrastructure, and port connectivity.

Approach

Screened and shortlisted ten biomass-rich regions with established chemical ecosystems across Europe, followed by targeted site assessments with input from EY local teams to identify the most strategic locations.

Outcome

Delivered clear site recommendations and location scenarios, enabling informed decisions on where to establish operations and how to scale the footprint over time.

3

Define playbook

US chemicals company

Post-M&A industrial footprint optimization

Objective

Assess the suitability of European sites to inform strategic footprint decisions, including consolidation, divestment, relocation, and potential single-site operations.

Approach

Combined country screening with in-depth evaluation of 14 sites across eight countries using the EY ILAS framework, modeling scenarios to optimize cost, carbon footprint, and risk.

Outcome

Defined three strategic pathways — expansion of existing sites, relocation to Poland, or development of a new site in Germany — enabling clear decision-making on future footprint and consolidation strategy.

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