



TABLE OF CONTENTS

FOREWORD..... 1

SECTION 1: Survey Sample and Demographics3

SECTION 2: Return of Overseas Operations to North America Since 2009

 Value of Operations Returned to North America.....6

 Movement of Overseas Operations by Countries of Origin and Destination7

 Types of Operations Returned to North America8

 Jobs Returned to North America10

 Drivers of Decisions to Return Operations to North America.....12

SECTION 3: Creation of New Operations in North America Since 2009

 Value of New Operations Created in North America.....15

 Types of New Operations Created in North America16

 Jobs Created by New Operations in North America18

 Drivers of Decisions to Locate New Operations in North America.....20

SECTION 4: Planned Return of Overseas Operations to North America in the Next Three Years

 Value of Operations to be Returned to North America.....22

 Planned Movement of Overseas Operations by Countries of Origin and Destination23

 Types of Operations to be Returned to North America24

 Jobs to be Returned to North America25

 Drivers of Decisions to Return Operations to North America.....26

SECTION 5: Planned Location of New Operations in North America in the Next Three Years

 Value of New Operations to be Located in North America.....28

 Types of New Operations to be Located in North America29

 Jobs to be Created by New Operations in North America30

 Drivers of Decisions to Locate New Operations in North America.....31

SECTION 6: On-Shoring: Deterrents, Drivers and Issues

 Deterrents to On-Shoring in North America33

 Participants’ Observations.....34

SECTION 7: Domestic Sourcing Trends

 Evidence of Domestic Sourcing Trend37

 Industry Segments Sourcing Domestically.....38

 Types of Products Being Sourced Domestically39

 Drivers of Decisions to Source Domestically40

 Participants’ Comments about Sourcing40

 Outsourcing and its Relationship with Off-Shoring.....41

SECTION 8: Conclusions

 What the Survey Indicates about the Future Impact of On-Shoring in North America43

 The Cost Gap43

 The Way Forward for North America.....44

 Resources for Companies Contemplating On-Shoring.....45

APPENDICES

 Survey Questionnaire47

 Current IPC Studies and Reports.....51