

The Future of Shipbuilding in the Great Lakes St. Lawrence Region

*New opportunities for regional
shipyards & suppliers*



The Great Lakes and St. Lawrence region including Illinois, Indiana, Michigan, Minnesota, New York, Ohio, Ontario, Pennsylvania, Québec, and Wisconsin is a historic hub for North American shipbuilding that drove industrial growth and created high-wage jobs across the U.S. and Canada.

While global competition eventually shifted the region's focus from building new ships to providing repair and maintenance services, the region's core industrial assets and manufacturing competencies remain strong.

With these assets and competencies, the Great Lakes St. Lawrence region is ready to play a much more central role in North American shipbuilding, repair, and maritime innovation than it does today, and many perceived constraints are surmountable with targeted, coordinated investment. Across shipyards, suppliers, and vessels, the evidence points to an underutilized but strategically significant industrial corridor that can support defense, Coast Guard, Arctic, commercial, and decarbonization priorities. The primary challenge facing the region is the underutilization of its existing industrial shipbuilding corridor including its active shipyards, deep supplier base, skilled-trades workforce, and technology ecosystem.

Room for Growth: Shipbuilding Capacities and Capabilities

The opportunity to grow shipbuilding is substantial because the region is ready to sustain a significantly larger and more geographically distributed shipbuilding and repair network. This study examined multiple facets of the region's shipbuilding capacity, capability and constraints. Major findings include:

- **Substantial shipyard capacity exists, with room to grow:** there are 44 shipbuilding and repair sites across the region's 8 States and 2 Provinces, including 17 active shipyards, 6 inactive shipyards, and 21 clusters of undeveloped land suitable for new shipyards. The region can rapidly scale up large-vessel capabilities within established, ready-to-work industrial ecosystems by unlocking unused capacity at active yards and reviving infrastructure at inactive sites.
- **Deep regional supply chains:** In addition to extensive shipyard assets, the region is home to a massive cluster of firms that support shipbuilding activity. This study identified over 12,000 shipbuilding suppliers in the region, spanning propulsion, electronics, structural materials, and other systems. The deep and diverse maritime supplier base in the region indicates that the States and Provinces do not need to build new supply chains from scratch.
- **Vessel size limitations imposed by the St. Lawrence Seaway's lock dimensions are not an issue:** 46% of US naval vessels can fit through Seaway locks, while 97% of US Coast Guard and Army vessels, and 57% of the global commercial fleet can fit through the locks. For vessels larger than the locks, the region can utilize a "distributed production" approach by building massive hull sections or modules and transporting them via heavy-lift barges through the Seaway to coastal yards for final assembly. Simple modifications, like temporary buoyancy aids or the removal of masts, may also allow deep-draft ships to clear the locks safely.



FURTHER INFORMATION

This study's recommendations are backed by in-depth geospatial, industry, and supply chain data. Full methodology and data can be accessed via the [GSGP Maritime Resource Library](#).





Pathways for Investment: A Shared Regional Approach

Five specific investment pathways have been identified to leverage the region's shipbuilding strengths and assets:

1. Maritime technology R&D and commercialization
2. Marine supply chain growth and supplier conversion from other manufacturing sectors
3. Unmanned surface vessel production
4. Distributed production of ship hulls and modules for coastal assembly
5. Construction and repair of Seaway-max and frigate-sized vessels

These pathways should be understood through a regional lens that treats the binational industrial corridor, rather than any single State or Province, as the unit of competitive advantage. For that reason, the report argues that the region should first market itself collectively and act as a pre-competitive industrial bloc before encouraging intra-regional competition.

Looking ahead, the five strategic investment pathways provide a practical roadmap for translating these opportunities into action, beginning with maritime technology R&D and commercialization and extending through supply chain growth, unmanned vessel production, distributed ship construction, and Seaway-max and frigate-sized programs. Implementing these pathways through region-wide maritime industrial clusters, harmonized incentives, and deliberate site and supplier development will require sustained collaboration among governments, industry, labor, and research institutions, but offers the

prospect of durable regional prosperity and a more resilient continental maritime base anchored in the Great Lakes St. Lawrence region.

For all pathways, the clearest opportunities build on assets already in place. Potential opportunities for work include:

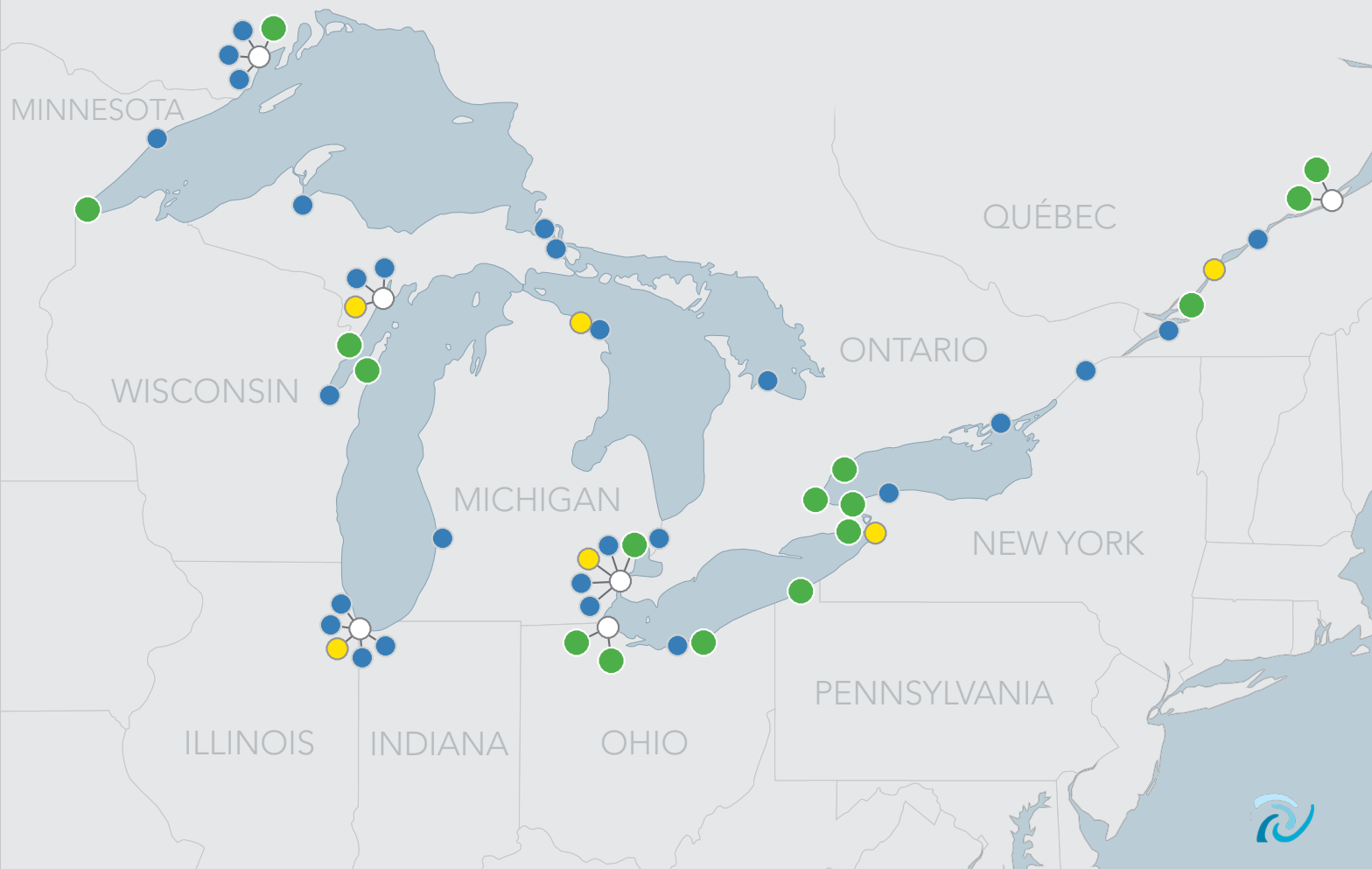
- Strengthening existing shipbuilding capability and co-locating new capacity where vessels, suppliers, and viable land converge.
- Publishing a framework describing compact new shipyard requirements for waterfront communities.
- Building a more integrated binational supply chain.
- Repatriating conversion and repurposing work that has shifted overseas.
- Marketing regional capacity to foreign-flag operators renewing Great Lakes-sized tonnage abroad.
- Using smart-vessel technologies and regulated autonomy pilots to improve existing operations while proving future trade lanes and demand.

Ultimately, analyses within this study confirm that the region's States and Provinces already possess the core assets required to become an increasingly important North American maritime industrial corridor, and that targeted, coordinated investment across the region can translate those assets into durable regional prosperity and a more resilient North American maritime base.



Great Lakes St. Lawrence Shipyard Infrastructure

- Active Shipyards
- Inactive Shipyards
- Potential Shipyard Locations



Data collected by the University of Michigan Department of Naval Architecture and Marine Engineering



WHAT IS THE GSGP MARITIME INITIATIVE?

The Maritime Initiative is our program of work to advance toward the three major goals of our Maritime Transportation System Strategy:



Double maritime trade



Reduce the environmental impact from transportation



Support the region's industrial core

For more information, please visit us at gsgp.org/projects/maritime

