



PNDC & Shipbuilding

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PNDC
PACIFIC NORTHWEST
DEFENSE COALITION

WASHINGTON PUBLIC PORTS ASSOCIATION

SKAMANIA LODGE · MAY 19, 2026

PACIFIC NORTHWEST DEFENSE COALITION

ABOUT THE ORGANIZATION

What is PNDC?



MEMBERSHIP

Trade association for PNW defense & manufacturing companies

300+ members

WA · OR · ID · MT · AK

PILLAR ONE

Member Advocacy

Advocacy & training
for member companies

PILLAR TWO

Defense Tech Innovation

Accelerating emerging tech
to the warfighter

Member Companies



Purpose of the Committee

01

NARRATIVE

Tell the PNW shipbuilding and repair story as a unified ecosystem.

02

FEDERAL ADVOCACY

Position the PNW with a clear "help us help YOU" message for Navy and congressional decision makers.

03

WORKFORCE

Aggregate regional demand, connect to training pipelines, feature strengths—not weaknesses.

The Defense Imperative

291

ships in Fleet today

355 required by law

▼ 64 SHIPS SHORT

\$305B

battle force construction

FY2027-2031

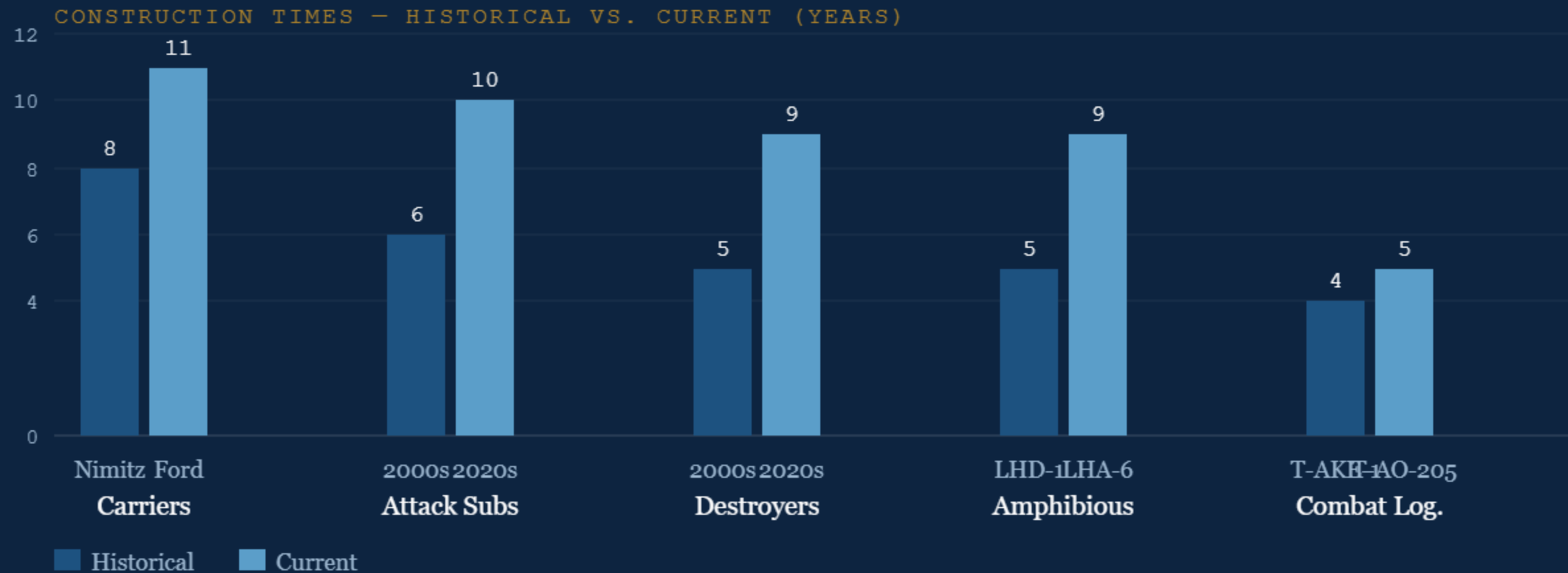
57% INCREASE OVER FY26

4 yrs

average delay

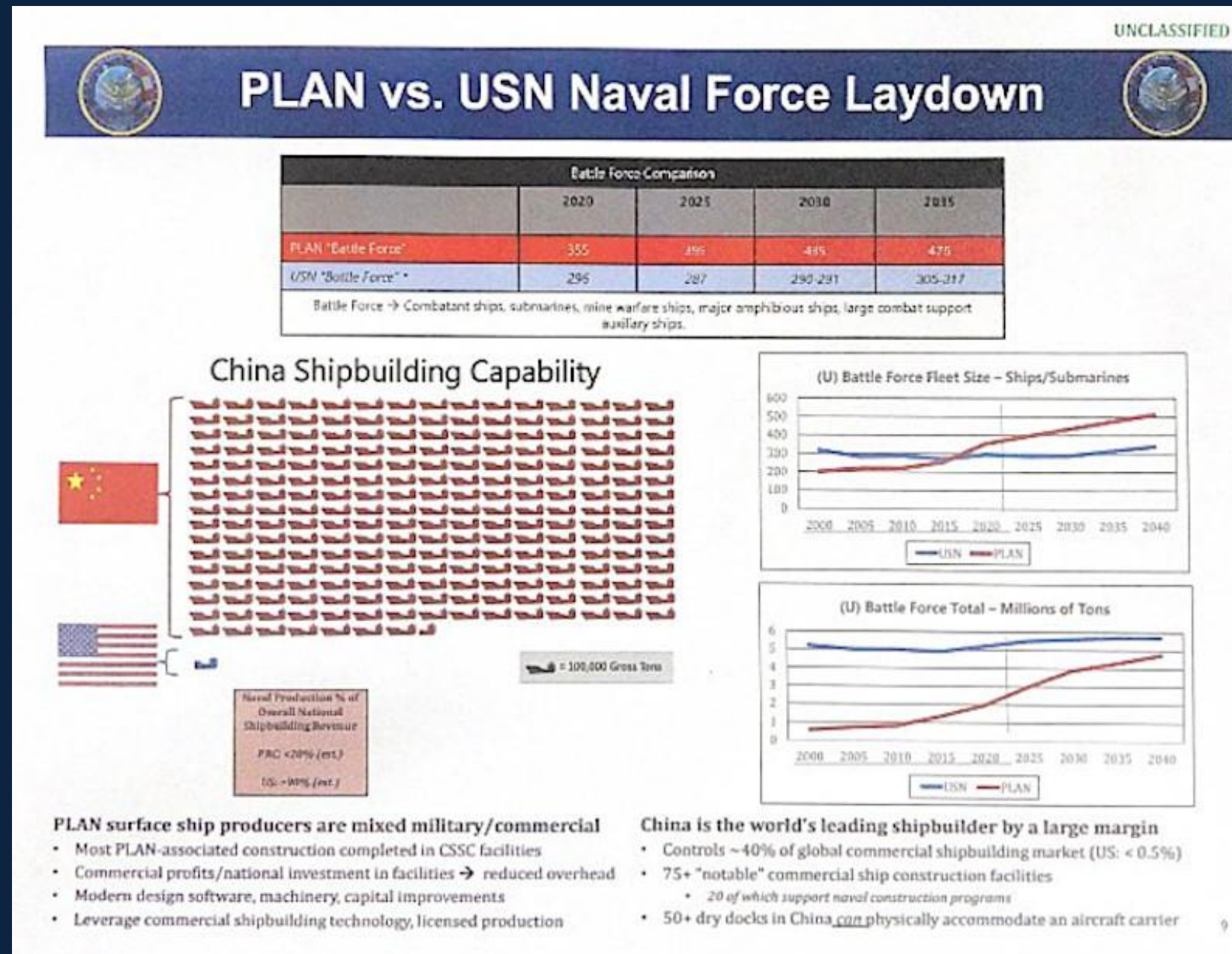
Virginia-class submarine

MORE MONEY, FEWER SHIPS



We're building fewer ships using more money and doing it slower.

PLAN vs. USN: The Capacity Gap



PLAN vs. USN: The Capacity Gap

SHIPBUILDING CAPACITY — GROSS TONNAGE (1 ICON = 100,000 GT)



China's shipyard capacity is 232x greater than the United States.

BATTLE FORCE COMPARISON (SHIPS + SUBMARINES)

	2020	2025	2030	2035
PLAN	355	395	435	475
USN	296	287	290-291	305-317

Navy Shipbuilding Architecture



What Industry Is Telling Us

Workforce is the binding constraint.

Not ambition. Not funding. Not political will.
People.

The "hourglass" workforce problem.

Entry-level interest exists. The experienced middle —
journeymen, pipefitters, machinists — is thin.

PNW cost of living is a structural disadvantage.

Shipyard wages that work in Pascagoula don't cover rent in Bremerton.

Demand signal is the fundamental constraint.

Yards scale on 5–10 year workload certainty. Without it, expansion stays cautious.



"The PNW has what the Navy needs. The challenge is organizing it."

— Ryan Peoples · PNDC Maritime Defense Conference · October 2025

Why the Pacific Northwest



STRATEGIC GEOGRAPHY

- Closest region in CONUS to Pacific theater —and to China.



U.S. NAVY INFRASTRUCTURE

- **Puget Sound Naval Shipyard**
Only nuclear-capable carrier and submarine maintenance facility on the West Coast.
- **Naval Base Kitsap–Bangor**
Largest ballistic missile submarine homeport in the U.S. Navy.



INDUSTRY & TECHNOLOGY DEPTH

- Deep and integrated ecosystem of skilled talent, specialized suppliers, advanced manufacturing, and proven shipbuilding and repair capacity that directly supports the Navy's mission.

How Ports Can Help

01

Preserve the Maritime Industrial Waterfront

Federal maritime tenants don't go out of business. Navy and Coast Guard are more stable long-term anchors than commercial development.

Plan accordingly.

02

Contribute to the Regional Capability Map

Share port tenant data with PNDC. Our capabilities dashboard will make PNW maritime industrial capacity visible to federal decision-makers.

Get counted.

03

Engage Federally as a Region

The PNW is more competitive as a unified voice than as a collection of individual organizations.

Join us.

The PNW has the capacity to answer the bell.

One unified voice · One generational opportunity.



Thank You

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WPPA SPRING MEETING · MAY 2026