

AWIBC 2024 Supplier Survey:

State of the Amphibious Warship Industrial Base and Keys to Winning the Future

In September of 2024, the U.S. Navy announced the multi-ship purchase of four amphibious warships. This began the journey for the construction of LPDs 33, 34, 35 and LHA 10.

We thank the U.S. Navy, Marine Corps, and all other supporters who helped bring this historic commitment to fruition.

It's an important milestone but only a first step—we hope this latest multi-ship purchase will set the precedent for future bundle buys as doing so saves taxpayers' money, strengthens the industrial base, and solidifies our readiness for future conflict.



To help document the effects of predictable funding on the issues the industrial base faces, the Amphibious Warship Industrial Base Coalition (AWIBC) conducted an annual survey for the past five years. The survey has evolved over time—starting as a way to gauge the impact of the COVID-19 pandemic, but today focusing on the serious challenges facing AWIBC's shipbuilding industrial base membership.

AWIBC'S NATIONAL IMPACT¹

650
COMPANIES

39
STATES

\$1.7B
OF WORK

249
CONGRESSIONAL DISTRICTS

Multi-ship Buy = Savings

The amphibious warship bundle buy of three LPDs and one LHA will drive a considerable increase in efficiency across the amphibious warship industrial base and includes \$1 billion in potential savings for American taxpayers.

Additionally, savings incurred by the industrial base help combat the top challenges suppliers consistently face as illustrated in the following response of an AWIBC member and survey respondent.

“Many components are expensive or have long lead times. A funded plan gives us a clearer timeline and forecast to manage inventory effectively, minimizing waste or gaps in supply.

Many of our products like butterfly valves are used on amphibians—with clear direction we can make sure we carry enough product to support.”

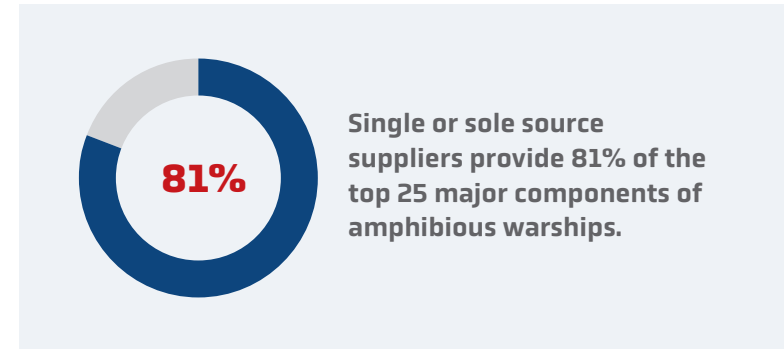
—Lisa Smith, CEO JA Moody
AWIBC Member and Survey Respondent

Bundled Purchases = A Stronger Shipbuilding Industry

65% of amphibious warship suppliers say that the bundle buy will lead to benefits starting as soon as 2025 or 2026.

By committing to purchasing multiple ships at once and providing advanced, predictable funding, suppliers across the nation are on better footing to plan for the future of their businesses, focus on investing in innovation and develop their highly skilled workforce.

Of the top 25 major components on amphibious warships, 81% come from single or sole source suppliers. These companies are crucial for the construction of amphibious warships but they can't survive if they don't have steady, predictable orders. The industrial base is innovative and highly capable but also fragile, underscoring the need for consistent support.



WHAT SURVEY RESPONDENTS SAID ABOUT THE BUNDLE BUY

82% of suppliers that support both amphibious ships and submarines agree that the bundle buy will benefit their capability to deliver on orders as well as their overall capacity.

52% Will strengthen the shipbuilding industrial base to meet the demand of today and tomorrow

46% Enables the hiring, retention and training of a workforce

42% Helps to invest in equipment to ensure quality and on-time delivery

Maximizing supplier capacity and investing in their workforce allows us to be better prepared for future surges in demand. Currently, only 10% of amphibious warship suppliers are operating at full capacity. Lacking capacity for the majority of suppliers is a key concern because it exacerbates difficulty with training and retaining skilled workers. By committing to the bundle buy and future block buys, we will build the most technologically advanced ships in their class, providing the decisive advantage on an ever-evolving battlefield.



This year's survey³ builds on previous data and tracks emerging trends to gather insights that support key program goals for the 2025–2026 budget cycle. YOY, our response rate increased by 50%, with 219 respondents this year.

¹Data reflects amphibious warship spending between 2019–2023.

²AWIBC administered a survey in October and November 2024 to a representative sample group of 219 suppliers that conduct business in all 50 states and Washington, D.C.