

Shipbuilding and Ship Repair: New Observatory to monitor Businesses, Employment and Economic Value across the Ports of Genoa

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The provision of a permanent tool to map the market structure of the shipbuilding and marine industries, track emergent trends and inform decisions shaping future development. This is the aim of the “Business, Employment, Economic Value” Observatory, established through the close collaboration between the Western Ligurian Sea Port Authority, the Confederation of Genoa Industry and the Confederation of Savona Industry. The first report was presented at a dedicated event organised at the historic port headquarters at Palazzo San Giorgio.

The report marks the beginning of an ongoing programme of data collection and analysis covering shipbuilding, ship repair, yacht construction and refitting services in the Ports of Genoa and Savona-Vado Ligure. These activities are a vital component of Liguria’s local economy, and a key driver in boosting Italy’s leadership across the global shipbuilding industry, bolstered by the region’s long-standing manufacturing tradition and specialist expertise.

The initial findings highlight the scale of this market segment, valued at approximately €2 billion in 2024, generating over €500 million in added-value and over 10,000 direct and indirect jobs. This database will be updated regularly to track business and employment trends, identify skills requirements and critical issues, and assess the conditions underpinning the sector’s competitiveness.

The partnership between the three organisations, formalised across a memorandum of understanding, brings together data published by the Port Authority, industry intelligence, information from trade associations and direct engagement with businesses. The survey covered 87 companies, with 63 responses, providing a solid basis for the analysis. The report examines four segments: shipbuilding, ship repair, yacht construction and yacht refitting. Production value in Genoa stands at approximately €1.9 billion, while in Savona-Vado Ligure it exceeds €50 million, with yacht construction accounting for the largest share, an upward trend since 2021 in both ports.

The industry comprises major contractors and a network of highly specialised companies, with over half of the respondents classified as small businesses. The close working relations between the large shipyards and smaller skilled subcontractors generate a substantial spillover to other sectors in terms of added-value. In fact, the industry is labour-intensive, employing approximately 4,400 people directly and a further 6,000 indirectly, spanning across over 60 dedicated specialised activities. Alongside shipwrights, welders, electricians and mechanics, the sector relies on designers, engineers and professionals in project management. Analysis of the Ports of Genoa industrial cluster shows that

employment in shipbuilding, ship repair, yacht construction and yacht repair is over nine times as concentrated than the national average.

The concentration of businesses and the availability of shared infrastructure, particularly drydocks, facilitate the integration of different operations and the exchange of expertise. However, the report also identifies high drydock utilisation rates and additional latent demand constrained by limited space and the capacity of existing facilities. Therefore, operational areas, berths and drydocks, equipped to cater for the vessel upsizing of modern vessels, are essential to the sector's industrial prospects. These requirements are also central to the discussions underway on the forthcoming Port Masterplan for Genoa and Savona-Vado.

Interviews with businesses also highlight difficulties in recruiting suitably qualified personnel, particularly for technical roles and skilled trades, alongside growing demand for professionals who can combine technical expertise with management skills. Electronics, advanced IT systems and onboard technologies are complementing traditional occupations, broadening the range of skills required by businesses. Closer cooperation with education and training providers, company-led internship programmes and greater awareness among young people of the career opportunities available in the sector will all be important in supporting generational renewal and the transfer of expertise.

The Observatory will continue to monitor these developments through regular updates to its economic indicators, extending its analysis to areas including research in innovation, environmental protection and safety. The shared objective is to establish a long-term resource for businesses and public institutions, supporting informed decision-making and helping to foster the sustainable development of an industry that is vital to Liguria's local economy and Italy's maritime industry overall.

Matteo Paroli, President of the Western Ligurian Sea Port Authority, commented: *"The shipbuilding, ship repair and yacht refitting industry ranks as one of Liguria's primary industries and represents one of Italy's major assets. Behind these figures are companies competing in global markets, drawing on invaluable long-standing experience and professional expertise, and a network of skilled subcontractors whose activities have a major spillover across other sectors and supply chains in the local economy. Together with the Confederations of Genoa and Savona Industry, we are committed to building a robust database of this sector and to keeping it firmly on the institutional agenda. The Observatory will enable us to monitor change, identify challenges and opportunities at an early stage, and work together to create the conditions for sustainable growth."*