BULK TERMINALS 2025 MARSEILLE – RESPONDING TO THE NEW AGE OF CHAOS

The Annual Conference of the Association of Bulk Terminal Operators (ABTO)
– the only event aimed at the entire bulk terminals industry

Radisson Blu Hotel Marseille Vieux Port, 29-30 October 2025

Please note the programme is subject to change

CONFERENCE PROGRAMME

PRE-CONFERENCE NETWORKING: TUESDAY 28 OCTOBER 2025

18:00 **Ice Breaker Drinks**

CONFERENCE DAY ONE: WEDNESDAY 29 OCTOBER 2025

08:15 **Registration and refreshments**

OPENING WELCOME ADDRESSES

09:00 **Welcome from ABTO**
Simon Gutteridge BA Law (Hons), FIMarEST, Chief Executive, ABTO

09:05 **Conference Chairman's opening remarks**
Professor Mike Bradley BSc Hons, PhD, Director, The Wolfson Centre for Bulk Solids Handling Technology, University of Greenwich; Chairman, Solids Handling and Processing Association (SHAPA) and the ABTO Members' Advisory Panel

09:15 **Welcome from the Port of Marseille Fos**
Hervé Martel, CEO & Chairman of the Executive Board, Port of Marseille Fos

BULK MARKETS

09:25 **Geopolitical tensions impacting the global bulk trade**
Both on land and at sea, the international geopolitical context has deteriorated significantly since the war in Ukraine and the war in Gaza. The maritime extension of these conflicts has resulted in a substantial increase in the threat at sea in several maritime areas and strategic choke points through which international maritime trade flows. In this deteriorating security context, bulk carriers have been and continue to be potential targets, due to the geographical location of the shipping routes they use in the Red Sea and Black Sea and the type of goods they carry. This results not just in rerouting and delays but possible changes in the choice of unloading and loading terminals.

- Bulk carriers in the deteriorating maritime geopolitical context
- Black Sea and bulk carriers: export of Ukrainian production exposed to missile and mines threats
- The Red Sea: What threat hangs over bulk carriers, from the start of the Houthi campaign in late 2023 to the sinking of the bulk carriers ETERNITY C and MAGIC SEA in July 2025
- Impact on bulk terminals

Louis Borer, Senior Analyst, Risk Intelligence A/S

09:50 **Impact on bulk markets of the US tariff regime**
As the Trump Administration launched tariff regimes on several of its trading partners, its partners retaliated, and a new era of trade wars sent shock waves through the markets. One example directly impacting the shipping industry was the United States Trade Representative (USTR) imposing fees on Chinese-built ships owned or operated by Chinese entities calling at US ports. For the dry bulk market, the implications of the trade wars are potentially significant. Greater volatility and changing trading patterns could lead to increased tonne-mile demand. These issues and more will be addressed in this fluid topic.

- Volatility caused by the ongoing tariff war between the US and other nations has impacted the global markets.
- In the short-term global tariffs will restrain demand as a wait to see¨ approach is taken, before decisions are made on possible trade shifts to minimise their impact.
- In the longer term, these tariffs will prompt a strategic redirection of trade routes, increasing shipping distances, in turn impacting the dry bulk industry.

Sean Fairley, Principal Consultant, Drewry

10:15 **The trade of iron ore in hectic times when countries are protecting their steel industries**
Although the steel trade has always been a contentious issue, the US's imposition of high tariffs has exacerbated tensions in the sector like never before. A key question is whether the steel conflict is having an impact on the iron ore trade, given that around 98% of global iron ore production is used for steel production. In other words, are the clashes 'downstream' having an impact 'upstream'? Based on the analysis of the latest available data for these two products, as well as the latest measures taken by major countries, this talk will therefore:

- Summarise the pattern of steel trade and highlight any key recent changes.
- Summarise the pattern of trade in iron ore and highlight any key recent changes.
- Conclude whether the heated rhetoric on steel threats is having repercussions for the global iron ore trade.

Pablo Rodas-Martini, Director of Market Intelligence, Emerging & Frontier LLC

10:40 **Changing patterns of the coal trade**

Despite several countries around the world turning away from coal as an energy source, it remains a key seaborne dry bulk commodity, accounting for around 25% of dry bulk shipments in 2024 (by weight). Nevertheless, trading patterns shift and the outlook for the trade in general depends on the balance of a few key factors.

- An overview of the coal market for the past year
- Causes of volatility in trade
- Our view of the next few years
- Outlining of risks to this view

Will Tooth, Senior Dry Bulk Analyst, SSY

11:05 **Refreshments**

11:35 **Circular biocarbon – *the easiest pathway to substitute fossil carbon in all coal applications***

Biocarbon products represent a 6,000-year success story, now perfected for maximum efficiency. The sector established optimised processes that minimize material and energy waste, ensuring an optimised mass and energy balance. Circular Biocarbon offers an easy pathway to replace fossil carbon across all coal applications—including power, processing, reduction, and anode production—and can permanently sequester atmospheric carbon. While primarily used as a coal substitute for energy, it is increasingly applied in processing industries and as an intermediary for further processing such as liquefaction and SAF. With numerous technology providers in the market, the number of industrial-scale plants is rapidly growing.

- The full array of products from pyrogenic treatments
- Technological processes and pathways for biocoal, biochar and biocarbon
- Use cases and market outlook in steel production, renewable power generation and carbon removal markets

Lisa Schmidt, Secretary General, International Biomass Torrefaction and Carbonisation Council (ITBC)

12:00 **Overview of cementitious trade**

Cement and clinker are generally classified as minor bulk commodities. However, cementitious materials extend beyond these two products to include other binders and supplementary materials such as granulated slag and fly ash. Their international trade is closely tied to global economic growth and demographic trends. The Mediterranean region remains one of the world’s major exporting hubs, while Europe continues to play a central role as an importing market.

Over the past five years, two major factors have reshaped cementitious trade flows: the industry’s drive toward decarbonisation and the geopolitical and economic turmoil around the Mediterranean Rim. These shifts in cementitious trade are also influencing regional port activity.

- Trends in cement and clinker trade over the past decade
- Key exporters and importers worldwide and in the Euro-Mediterranean region
- A focus on cement, clinker, and SCM trade in the Euromed area
- The impact of decarbonization strategies on trade flows
- Recent shifts and expected developments in regional supply chains and port logistics of these cement related products

Sylvie Doutres Ghizzo, Associate & Joint Managing Director, DsG Consultants

12:25 **Grain markets**
Grain markets have experienced a turbulent few years, with 2025 turning out to be no different. Trump's trade war has added a fresh round of uncertainty, especially for the prospects of the seasonal 4q US-China soybean trade. While trade war developments make headlines, structural changes appear to be taking place in global grain markets, affecting terminal throughput.

- Trump tariffs and US-China trade
- The shift to South America
- Chinese agricultural self-sufficiency
- Russia/Ukraine developments amid ongoing war

Cara Hatton, Dry Bulk Analyst, SSY

12:50 **Q & A and discussions**

13:00 **Lunch**

OPERATIONS

14:30 **Challenges making the transition to new bulk traffics**
Decarbonisation and deindustrialisation across Europe have significantly reduced traditional major bulk traffics in ports. This decline has translated into lower revenues for port authorities and dry bulk operators, driven by the sharp drop in coal and iron ore volumes. The key questions now are: how can this revenue gap be addressed? Which emerging products might replace coal and iron ore in the future, and what would be the implications for port infrastructure and operations?
Through CASE STUDIES from France, Spain, and the Netherlands, this presentation will explore possible answers and highlight practical solutions.

- Substituting coal and iron ore with alternative traffics
- Optimizing the use of newly available port space
- Leveraging deep-sea berthing facilities more effectively
- Key take-aways and conclusions

Sylvie Doutres Ghizzo

14:55 **Efficiency versus flexibility *– how to choose in a time of turbulence in trade patterns?***
Times are turbulent. Unpredictable tariffs, trade wars, real wars, climate change affecting agricultural productivity, rising sea levels - all these things put uncertainty in our calculations of what will be traded and where in the future. At the same time there are some things that are more or less certain - people will need to eat, and we'll need steel for making things, be they bean tins or guns.
These matters should factor into our forwards planning for port investment. This presentation seeks to provide some food for thought about how this conundrum can be examined and a sensible strategy for hedging of bets to be developed. A few key issues:

- Port infrastructure investment has a 30-to-50-year time horizon
- In that timescale, it's highly likely that what you're handling now, will change in ways you wouldn't even be able to imagine today
- On that basis it makes sense to build in flexibility in equipment choice
- But the down-side is that flexibility costs more money and often compromises efficiency, environmental emissions and economic performance

Professor Mike Bradley

15:20 **CASE STUDY: Operating a multi-bulk terminal**

The port of Caronte has a century-long history. It was originally established to handle coal, due to pollution and space constraints at the main port of Marseille.

Over time, the port has transformed from a single-product import facility into a versatile hub for handling a wide variety of goods for both import and export. This change was supported by the introduction of dedicated and custom-built infrastructure, including silos and warehousing.

This significant transformation was driven by several key changes, including the modernisation of handling equipment and facilities, rigorous training for technical and operational staff, the careful management of different bulk materials coexisting at the site, and a strong commitment to meeting environmental standards.

- A century of history at the port of Caronte
- Modernization of handling equipment and facilities
- Maintaining the integrity of products, vessels, and the port itself
- Adherence to environmental standards and adapting to changes
- Focus on flexibility and agility

Sylvie Collange, Chief Executive Officer, SEA-invest Caronte Terminal, Marseille Fos

15:45 **Business development playbook for dry bulk terminals**

Changing macroeconomic conditions and an evolving regulatory landscape on sustainability are reshaping global raw material flows and accelerating the transition towards greener supply chains. For bulk terminal operators, this shift opens new opportunities while making business development a critical function to secure sustainable revenue streams in the future. This session will explore how to identify opportunities, screen and qualify pipelines, and move effectively from an idea to a final investment decision (FID), highlighting the common pitfalls at each stage. We will close with an interactive Q&A to exchange knowledge and best practices.

- Evolving macro trends, the sustainability transition, and the impact on bulk operators
- Business development as a driver of long-term growth
- From opportunity identification to FID – steps and pitfalls
- Interactive Q&A and knowledge sharing

Firas Ezzeddine, Chief Commercial Officer, HES MED Terminals

16:10 **Refreshments**

16:40 **Smart berth planning – *benefits of minimising idle time***

Smart berth planning can markedly reduce vessel idle time and streamline cargo handling. This session examines how HANSAPORT in Hamburg harnessed berth planning and how Marsa Maroc in Casablanca leveraged real-time port call coordination, alongside just-in-time arrival alerts, to optimise resource allocation and cut waiting periods at the berth. We also explore the role of transparent, cross-stakeholder communication in aligning schedules and leave you with practical strategies to boost berth utilisation and minimise idle hours

- Just-in-time arrivals enable terminals to better plan resources and reduce waiting periods at the berth
- Transparent communication among stakeholders helps align working schedules and supports more coordinated port operations
- CASE STUDY: Smart berth planning has reduced vessel idle time and improved cargo handling flow at HANSAPORT dry bulk terminal, Hamburg.
- Attendees will take away practical tips to improve berth utilisation and cut down on idle time

Jan Cantow, Co-Founder, Heyport

17:05 **Leveraging smart diagnostics and predictive analytics to streamline maintenance and ensure operational continuity**

Modern bulk handling systems are under pressure to maximise availability while minimising maintenance costs. The presentation shows how intelligent sensor technology and data-based analysis methods automate condition monitoring and optimise maintenance processes. Practical examples will be used to explain how predictive diagnostics help to avoid unplanned downtimes, extend maintenance cycles and sustainably increase operational reliability.

- Condition monitoring & predictive maintenance in bulk handling
- Utilising predictive analytics to streamline maintenance
- Benefits of ensuring operational continuity

Richard Habering, Head of Business Unit, igus Smart Plastics

17:30 **Real-time volume and quality tracking from warehouse to terminal**

The implementation of a radar-based solution for real-time volume and quality tracking from warehouse to terminal enables the enhancement of port operations in challenging high-dust environments. This technology addresses the complexities of monitoring diverse materials for multiple users.

- Enables precise volume measurement and material flow tracking despite dust interference
- Supports adaptation to new product types and user requirements
- Drives investment in advanced technology for future port resilience

Dr Christian Augustin LLM, Managing Director and **Julien Pierre,** Regional Sales Manager, indurad GmbH

SAFETY

17:55 **Minimising risk, increasing safety**

This session will begin with an overview of the types of port-related claims commonly encountered at TT Club. These include incidents such as fires, cargo contamination or mixing, bodily injuries, and miscommunication between stevedores and vessel crews. Each of these events can have significant operational and financial consequences, and they highlight the complex risk landscape faced by port operators. A key – yet often overlooked – aspect of effective risk management is the proactive reduction of potential consequences following an incident. While much attention is given to prevention, the mitigation of impact plays a crucial role in limiting disruption and liability.

Following this overview, current innovations in port skills and safety gathered by the Club's Loss prevention Team from recent industry developments with the aim of supporting safer and more resilient port operations, will be presented.

Examples of port related claims: crisis management and mitigation strategies

- Bodily injury incidents involving port personnel, third parties or crew
- Cargo contamination or mix-ups during handling
- Fires occurring in storage areas or during operations
- Improper cargo handling leading to damage or operational delays

Loss prevention
- Recent technological and procedural advancements aimed at improving safety and efficiency in port operations
- Practical tools, recommendations, and training developed to support risk reduction and incident

Géraldine Savin, Senior Claims Executive, TT Club

18:20 **Q & A and discussions**

18:35 **Chairman's conclusions and close of day one**

EVENING SESSION

18:45 **Depart for the Conference Reception at Le Petit Pernod, with views of the Old Port and Notre-Dame**

CONFERENCE DAY TWO: THURSDAY 30 OCTOBER 2025

08:30 **Refreshments**

09:00 **Conference Chairman's opening remarks**
Professor Mike Bradley

ENVIRONMENT

09:05 **Implications for bulk terminals when a deep-sea port powered by 20th century fossil fuel makes the transition to 21st century carbon free energy**
Decarbonising one of France's main industrial areas impacts the Port's former pure bulk import terminal. The Terminal Multi-Vracs of Fos (TMF), originally dedicated to coal and bauxite import is adapting to new traffic with the development of low carbon emission industrial plants nearby. After a quick overview of the Port of Marseille Fos and its traffic, we shall focus on bulk and how the ongoing transformation of the local industry offers perspective and opportunities. The TMF is part of the undergoing industrial revolution.
- Port general overview
- History of Fos Industrial Zone (FIZ) seen from the bulk terminal
- Decarbonising FIZ – a field of opportunities

Mark Lazzaretto, Solid Bulk Sector Manager and Industry & Decarbonisation Manager, Port of Marseille Fos

09:30 **Particulate emission control**
There are many problems with current bulk handling logistics, such as dust generation from the various transfer points at a mine or handling facility to the final destination and extended exposure to harmful airborne pollutants. In some situations, containerised bulk handling (CBM) offers solutions to these environmental problems and for some for some commodities definite operational advantages.
- Problems with current bulk handling logistics
- Other methods to help reduce dust particulates and environmental impact
- Situations where CBH is the way forward in reducing particulate emissions

Frank van Laarhoven, Senior Sales Manager Europe, RAM Spreaders

09:55 **Port and terminal resilience to climate adaptation**

Modern ports and terminals face an increasing range of climate change related challenges, including rising sea levels, extreme weather events, heat stress, and increased flood risks. These events threaten critical infrastructure, disrupt supply chains, and expose the interdependencies between spatial planning, logistics, and operational continuity. As gateways for global trade and hubs of economic activity, ports and terminals must actively strengthen their climate resilience to remain competitive and reliable in a rapidly changing environment. This presentation deals with the risks and shows mitigation measures for ports and terminals.

- Dealing with climate change in the port sector
- Risks and solutions for ports and terminals
- Planning and implementation

Anthony van der Hoest, Global Solutions Director - Resilient Ports and Maritime Transportation, Arcadis

10:20 **Q & A and discussions**

10:30 **Refreshments**

CYBER SECURITY

11:00 **Update on the latest cyber threats**

Presentation will share real-world insights into how bulk terminals can strengthen their cyber defences while keeping operations running smoothly. Expect practical strategies, lessons from the field, and a clear roadmap for reducing risk in today's high-threat environment.

- Update on cyber threats affecting maritime and port operations
- Practical strategies for reducing cyber risk in port and terminal operations
- How to meet compliance without slowing operations
- Lessons learned from securing global offshore and bulk terminal projects

Richard Hodder, Managing Director & Principal Cybersecurity Consultant, Engage Cyber

11:25 **CASE STUDY: Marseille Port's response to cyber threat**

Protecting the Port of Marseille-Fos against cyber-attacks involves understanding what an IT system is, the types of possible attack, how the attack takes place, and what organisational and technical measures to take. The presentation addresses the protection of maritime, land and computer access, risk management, attack processes, the typology of attacks, the cyber organisation, and the technical responses. It highlights the importance of cyber risk awareness and best practices to maintain security and responsiveness in case of a major crisis.

- How to appreciate and manage cyber risks
- The typology and process of cyberattacks
- The measures taken by the Port Authority of Marseille Fos – organisational, technical and good practices of employees

Paul Franquart, Chief Information Security Officer, Port Authority of Marseille Fos

11:50 **Discussion and questions**

12:00 **Chairman's summary of conference deliberations**

12:15 **Depart Radisson Blu Vieux Port for lunch at the Villa Khariessa in Martigues overlooking the Étang de Berre**

TERMINAL VISIT

15:00 **Terminal Visit: SEA-invest Caronte Terminal, Marseille Fos**

16:00 **Close of conference and return by coach to central Marseille ***
***** Approximate timing

REGISTER HERE for Bulk Terminals Marseille and for details of the Radisson Blu Hotel Marseille Vieux Port conference hotel.

With thanks to our host port of Marseille Fos, conference partner DSG Consultants, sponsors and supporting organisations & media partners