BULK TERMINALS A CORUÑA – COPING WITH CONTINUING UNCERTAINTIES

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

Hotel Eurostars Atlántico, 21-22 October 2026

Please note this document subject to change. Speakers and subject headings may change from as they appear below.

CONFERENCE PROGRAMME

PRE-CONFERENCE NETWORKING: TUESDAY 20 OCTOBER 2025

18:00 **Ice Breaker Drinks**

CONFERENCE DAY ONE: WEDNESDAY 21 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

09:10 **Welcome from the Port of Authority of A Coruña**
Martin Fernandez Prado, Executive Chairman, Port Authority of A Coruna

09:15 **Representatives of the Regional Government of Galicia and the Municipalities of A Coruña and Arteixo**
Speakers to be confirmed

BULK MARKETS

Session Chairman:
Sean Fairley, Principal Consultant, Drewry Shipping Consultants

09:20 **KEYNOTE: Continuing geopolitical tensions and volatility of the US tariff regime impacting the global bulk trade**

The global trading system is undergoing a structural shift, which is increasingly impacting the dry bulk shipping markets. What is emerging is a transition from a liberal, rules-based model of globalisation towards a fragmented, policy-driven system increasingly shaped by geopolitics, tariffs, economic and national security considerations.

- Geopolitics is increasingly shaping global trade, with conflicts and security concerns disrupting supply chains and changing shipping routes
- Tariffs are becoming a permanent feature of trade policy, influencing investment decisions, manufacturing locations, and trade competitiveness
- Trade is becoming more regional and strategically aligned, with countries using FTAs and partnerships to strengthen supply chains and reduce geopolitical risks
- Shipping is adapting to new trade patterns, including longer voyage distances, greater supply chain diversification, and increased market volatility – creating winners and losers for ports and terminals

Sean Fairley

09:50 **Does high steel protectionism impact the international iron ore trade?**

While iron ore trade has always been contentious, the US's imposition of high tariffs during the current administration has exacerbated tensions in the steel industry. A key question is whether the steel conflict is affecting the iron ore trade, given that around 98 per cent of global iron ore production is used for steel production. In other words, are clashes 'downstream' having an impact 'upstream'? This talk will address this question by analysing the latest available data on these two products and the latest measures taken by major countries.

- The key features of the steel trade pattern
- The key features of the iron ore trade pattern
- How do the two patterns relate to each other on a global scale?

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

10:20 **Coal - *remains a key dry bulk commodity***

Coal remains one of the world's largest dry bulk commodities despite accelerating efforts to reduce greenhouse gas emissions. Thermal coal continues to underpin electricity generation in many developing economies, particularly across Asia, while metallurgical coal remains essential for conventional steel production. International trade is dominated by exports from Australia, Indonesia and Russia (with ongoing European Union embargo) with China, India and Japan among the largest importers. Although demand is expected to decline gradually in Europe and North America, growing energy requirements in parts of Asia are likely to sustain seaborne trade over the medium term. Metallurgical coal is expected to remain more resilient as the steel industry transitions towards lower-carbon production methods.

- Introduction – coal from the Polish perspective
- Global coal consumption and production
- Worldwide perspective of coal usage
- Coal demand by sector, global energy demand
- International seaborne coal trade, current market shifts and outlook.
- Conclusions

Tomasz Mańka, Director of Commercial Division, Węglokoks S.A. *-and-*
Chairman Market Committee, EURACOAL

10:50 **Refreshments**

11:20 **Grain markets – *conflicts and structural changes***
Grain markets have not stood still in 2026, providing the dry bulk market with a welcome boost. The seaborne grain trade has seen record tonne and tonne-mile demand so far this year. The surge has been led by the Americas, while flows elsewhere have been softer. But which bulk terminals will be the winners and losers? Lately, trade wars, chokepoint disruptions, El Niño risks have dominated the narrative, but beneath them are slower moving stories that are quietly shaping the future.

- Record volumes and the Americas-led surge
- Trade policy, tariffs and shifting trade flows
- Supply-side disruptions: El Niño and shipping chokepoints
- Structural demand: China, biofuels and emerging markets

Harry Grimes, Head of Dry Bulk Research & Data Analytics, Arrow

11:50 **Cementitious trade - *factors reshaping trade flows***
This presentation examines the major forces transforming Euro-Mediterranean cementitious trade, from The European Union's Carbon Border Adjustment Mechanism (CBAM) and geopolitical tensions to the rapid evolution of Supply Chain Management (SCM) supply chains. It highlights how these changes are redefining trade routes, sourcing strategies, port logistics and maritime transport, creating a new competitive landscape for producers, traders, and terminal operators.

- 2026: A perfect storm – the new drivers of cementitious trade
- Recent evolution of Euro-Mediterranean cementitious trade flows
- CBAM: First market impacts on the cement and clinker trade
- SCMs: The new strategic battlefield
- How shipping and port logistics are adapting
- Key takeaways and outlook

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

12:20 **Discussion and questions**

OPERATIONS AND OPPORTUNITIES

12:30 **Minimising cargo losses between ship and shore**
In ship loading and unloading, it's quite common to find significant spillage of cargo. There are various reasons for this, notably leakage from grabs, mis-landing of the grab, wind lift-off from falling streams or material surfaces etc. This can result in major environmental pollution as well as various safety problems and significant cargo loss. This paper will address the matter based on practical experience.

- Common causes of spillage and lift-off of bulk cargos in loading and discharge
- Safety, environmental and economic effects
- Practical means for mitigating the matter

Professor Mike Bradley

13:00 **Lunch**

14:00 **Lubrication free polymers in bulk terminal applications**

Reducing or eliminating friction in bulk terminal equipment can yield operational and safety dividends. Maintenance down time is reduced. The failure of lubrication to metal bearings or moving parts causes friction resulting in heat, which precipitates fires and explosions where dust is either airborne or has settled on equipment. Where lubrication free polymers can be used instead of metal for bearings or moving parts on equipment these dangers are eliminated.

- Reducing maintenance requirements in bulk terminal equipment through lubrication-free polymer and composite technologies.
- Extending service life and improving operational reliability in highly contaminated and corrosive environments.
- Eliminating grease and oil contamination risks in bulk material handling applications.
- Improving sustainability and lowering total cost of ownership through maintenance-free bearing solutions.

Jon Mentxaka, Product Manager BRG & Industry Manager Renewable Energy, igus España

14:30 **CASE STUDIES of CapEx and OpEx considerations in equipment purchases**

All too often bulk handling equipment decisions hinge on CapEx and OpEx trade-offs. Where sustained high volume flows are predicted, cutting corners on cost when it comes to equipment purchases has a potentially serious impact on maintaining operations. Typically, rather than opting for a bespoke system this involves buying off the peg to achieve lower CapEx. This inevitably results in higher OpEx: Increased energy and maintenance costs, loss of throughput due to breakdowns and consequent reputational damage – overall a much higher Total Cost of Ownership (TCO).

- What impact can adapted local conditions for ship unloaders have on return of investment?
- How does choice of ship unloading technique affect CapEx and OpEx costs?
- What effect can selective size of vessels have on ship unloading OpEx costs?

David Ingvarsson, Sales Manager-Europe, BRUKS Siwertell

15:00 **A Coruña: A port of destination and a logistics distribution platform**

In the agrifood sector port activity has shifted from the Inner Port to the Outer Port, moving an activity with a high environmental impact to a new location. This opens up new possibilities for other kinds of clean cargo in the inner port close to the urban areas of the city. At the outer port, significant investment in new infrastructure has enhanced the strategic position of the port for traffic in the agrifood sector

- Achieving the efficient reception, handling, storage and inland distribution of bulk cargo
- Role of the port in the agrifood supply chain
- Operations at the Outer Port of A Coruña at Punta Langosteira
- Storage and value-added logistics
- Distribution to the hinterland
- Competitiveness and the future outlook

Moderator: Irene Souto, Head of Port and Business Development, Port of A Coruña Authority

Panel: Roque González Nogueira, Director Supply Chain and Terminals, Galigrain SAU *-and-*

Jorge Rico Caramés, Commercial Director, Pérez Torres Marítima SL(PTM) *-and-*

Pablo Ramilo Méndez, Director, Erhardt Logistics Galicia and Director, Terminales Marítimos de Galicia (TGMA)

15:35 **Refreshments**

16:05 **REPORT: The SMARTSTORE project – *improving port logistics, storage and transformation of relevant products in Galicia through Industry 4.0 technologies***

The SMARTSTORE project explores how digital technologies can be effectively applied to improve efficiency and competitiveness within bulk terminal operations. Developed in a real port environment in Galicia, the project combines smart data systems with advanced positioning technologies to enhance cargo handling, storage optimisation and inventory visibility.

By embedding these tools into day-to-day operations, SMARTSTORE supports more informed decision-making, better use of resources and improved traceability across the agrifood logistics chain. This presentation will outline the project approach, key functionalities and operational outcomes, offering practical insights into how innovation can deliver measurable improvements in port performance and service capability.

- Improving efficiency and competitiveness in bulk terminal operations through practical Industry 4.0 applications
- Enhancing cargo handling, storage performance and operational visibility across port logistics flows
- Integrating smart data and positioning systems to support real-time decision-making on site
- Strengthening traceability and inventory control within the agrifood supply chain
- Lessons learned from deploying SMARTSTORE in a live port terminal, including operational impact and implementation challenges

Javier Sánchez, Innovation Manager – Bulk Logistics and Port Operations, Galigrain SAU

16:35 **CASE STUDIES: Implementing a terminal operations system**

Each general cargo and bulk terminal has its own operational profile, meaning there is no true "one-size-fits-all" Terminal Operating System. However, there are several core capabilities that any robust TOS should deliver and there are "must have" customisations. The challenge is to include these in the specs and contract. This is where a structured procurement approach becomes critical.

- How a well-structured procurement process can maximise value for terminal operators beyond simple vendor selection.
- Selecting the right procurement strategy to balance risk, flexibility, and cost efficiency.
- Designing tendering and contracting approaches that ensure transparency, comparability, and long-term deliverability.
- Need for unified, real-time operational visibility
- Ensure reduced demurrage and improved throughput
- Incorporate scalability and future-readiness

Kent Busk, Director Seaport Group *-and-*
Mo Dualeh, EMEA Sales Manager, TBA `

17:05 **Moving from a concept to commissioning**
Moving a sustainable infrastructure project from a promising concept to a bankable Final Investment Decision (FID) is rarely a straight line. Drawing on a recent diversification project at a major European port, this presentation walks through a structured framework for commercial readiness, financial structuring, technical design, permitting and stakeholder alignment, used to take the project from concept to FID. The talk shares practical lessons on how to maintain momentum through a complex, multi-year investment process.

- Why capital projects in sustainable port infrastructure stall between concept and a bankable investment decision
- A structured framework for running commercial, financial, technical, permitting and stakeholder workstreams in parallel
- Practical lessons from taking a major European port diversification project through to Final Investment Decision
- What boards and investment committees actually need to see before they commit capital
- How to maintain momentum in a multi-year infrastructure decision process

Hani Katerji, Founder & Director, Hani Katerji Consulting

17:35 **Discussion and questions**

17:50 **Chairman's conclusions and close of day one conference proceedings**

EVENING SESSION

18:00 **Conference reception kindly sponsored by the Port of A Coruña Authority**

Port of A Coruña
Port Authority of A Coruña

CONFERENCE DAY TWO: THURSDAY 22 OCTOBER 2025

08:30 Refreshments

OPENING REMARKS

09:00 **Conference Chairman's opening remarks and introduction to day two**
Professor Mike Bradley

CYBER SECURITY AND AI

09:05 **Update on the threat – *how artificial intelligence is reshaping the cyber-risk landscape for bulk terminals***

Artificial intelligence is changing the cyber-threat landscape at speed. Attackers can now create more convincing phishing campaigns, automate reconnaissance, develop malicious code more efficiently and impersonate trusted suppliers, employees and senior decision-makers. For bulk terminals, where interconnected operational technology, legacy equipment, third-party access and safety-critical processes must operate continuously, these developments create risks that extend far beyond the corporate IT network. This presentation will examine how AI is changing both the nature and pace of cyber threats and outline practical steps terminals can take to strengthen resilience without disrupting operations.

- How cybercriminals are using AI to accelerate reconnaissance, phishing, social engineering and the development of cyberattacks
- Why bulk terminals are particularly exposed through operational technology, remote access, contractors, suppliers and increasingly connected equipment
- The growing threat from deepfakes, voice cloning and fraudulent instructions targeting payments, cargo movements and operational decision-making
- How an attack originating in business IT can cross into terminal operations and affect availability, safety, loading, storage and ship-to-shore activities
- Practical measures terminal operators can take now to improve visibility, protect critical systems and build resilience against AI-enabled threats

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

ENVIRONMENT AND SAFETY

09:35 **PANEL: An holistic approach to fire mitigation at bulk terminals**

Fires are one of the biggest threats to port and terminal safety, and the seriousness of their impact can vary significantly depending on their size, reach, origin and the time it takes to put it out.

The conditions that can lead to a fire outbreak in bulk terminal include the improper storage of flammable materials or hazardous cargo, etc. Given this multiplicity of factors, it is imperative that ports and terminals can identify these on time. By doing so, not only can they implement proper mitigation protocols are but also deploy the right firefighting and fire detection equipment for each potential scenario.

It is by developing a holistic strategy that incorporates reactive and preventive measures that ports and terminals can minimize fire risks and their potential damage. This panel will gather specialists in fire risk management to discuss multiple approaches to this safety issue.

- Fire risks and hazards at the terminal: What to look for and what to avoid?
- What are the different types of fires? How do these vary in terms of cause and firefighting methods?
- What is the right fire fighting equipment for each specific fire type?
- Understanding the importance of firefighting equipment maintenance
- What to do when a fire starts?

Moderator: Neil Dalus, Risk Assessment Manager, TT Club

Panel: Tommy Carnebo, Training Manager and EV Risk Specialist, Dafo Vehicle AB *-and-* Robert Tengval, Key Account Manager, Fogmaker

10:15 **PANEL: Dust suppression**

Dust suppression in dry bulk terminals is critical for worker safety as well as equipment protection. Explosions are just one consequence – if the most dramatic and with frequently fatal consequences – of paying insufficient attention to dust suppression. Community relations and environmental compliance are also major concerns for bulk terminal operators. Designing an effective dust suppression system starts with analysing the characteristics of the dust being processed. Methods include:

- Misting
- Loading socks; telescopic chutes; dust suppression hoppers; cascading chutes
- Air extraction

Moderator: Professor Mike Bradley
Panel: Frank van Laarhoven *-and-* David Ingvarsson

10:45 **Refreshments**

11:15 **Understanding climate risks, planning adaptive responses and embedding resilience**

Climate risks impact in a number of ways. Extreme weather events cause rising sea levels and increased flood risks, as well as heat stress. Planning adaptive responses and embedding resilience starts with understanding these risks. This presentation will examine the current issues and climate outlook, discussing the effects of climate change on port and terminal infrastructure and their operations and the need to embed resilience.

- Climate risk and operational resilience
- Extreme weather and business continuity
- Understanding exposure and vulnerability
- Practical adaptation strategies for ports and terminals
- Embedding resilience into decision making

Dorota Jilli, Senior Underwriter, TT Club

10:45 **PANEL DISCUSION: A Coruña Green Port**

The Port Authority of A Coruña has focused in recent years on its strategy for transforming its activities to fit the ecological transition as part of the project A Coruña Green Port. Among its objectives are to be a catalyst for energy innovation in the local industrial sector by using renewable energies that produce zero emissions and to create an energy and maritime industrial hub. The panel will discuss the progress to these objectives and how bulk terminals have contributed to their implementation.

- The green hydrogen and ammonia value chain and its integration into the industrial activities
- Industrial transformation and the production of renewable fuels to replace traditional fuels
- The digitisation and modernisation of the companies in the port
- Energy storage and the electrification of the port
- Bulk terminals contribution to the project of A Coruña Green Port

Moderator: Andrés Guerra, Head of Sustainability and Strategy, Port of A Coruña Authority
Panel: Panellist from Galigrain SAU *-and-*
Jorge Rico Caramés, Commercial Director, Pérez Torres Marítima SL (PTM) *-and-*
Daniel Carrera Villar, Chartering & Operations Manager, Erhardt Logistics Galicia

12:10 **Discussion and questions**

12:30 **Chairman's summary of conference deliberations**
Professor Mike Bradley

12:45 **Lunch**

13:50 **Depart Hotel Eurostars Atlántico for the Outer Port of A Coruña to visit Galigrain (GrupoNogar), PTM and TMGA terminals**

16:30 **Close of conference and return by coach to central A Coruña ***
***** Approximate timing

REGISTRATION

Register HERE to join us at Bulk Terminals A Coruña 2026

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events@bulkterminals.org

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