BREAKBULK

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2026 STAGE CONTENT SUMMARY

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THE BIG PICTURE

Across the **Breakbulk Live** and **Breakbulk Voices** stages, this year's content program explored a broad pipeline for energy, infrastructure and manufacturing. The recurring question was how to turn demand into delivered projects amid constrained equipment, routes, labor, power and policy. Speakers pointed to earlier planning, stronger regional links and resilience built into day-to-day operating decisions.

22 SESSIONS
12 BREAKBULK LIVE
10 BREAKBULK VOICES
74 SPEAKERS





THE BIG PICTURE

OPERATING PRIORITIES FOR PROJECT LEADERS

- Demand is expanding across LNG, critical minerals, grid upgrades, data centers, nuclear power and manufacturing, but project maturity varies. Treat announced pipelines as potential demand, then align investment with credible timing and readiness.
- Early engagement improves delivery. Ports, carriers, logistics teams, EPCs, manufacturers and owners need to test routes, sites, schedules and equipment needs before key design and procurement choices are fixed.
- Resilience must be operational. Keep alternate routes, storage, tariff terms, weather plans and capacity options ready, with clear triggers for when to use them.
- People and information are core infrastructure. Workforce development, mentorship, asset data and reliable project information support safer execution and more timely decisions.

SETTING THE SCENE: INSIGHTS FROM THE EXECUTIVE SUMMIT

The Executive Summit brought senior industry executives together for a closed-door, invitation-only event ahead of the main conference program. Its candid, peer-level discussions examined how leaders can make decisions and deliver projects while uncertainty becomes a lasting operating condition.

The discussions highlighted four priorities for leaders navigating this uncertainty:

- **Treat uncertainty as the operating environment**
  Geopolitics, tariffs and industrial policy can shift costs, routes and schedules with little notice. Executives need plans that can adapt as conditions change, rather than assuming disruption will pass before normal operations resume.

- **Compete on resilience as well as price**
  Reliable schedules, integrated capabilities, visibility and trusted partnerships can protect project outcomes when the lowest rate cannot absorb disruption or delivery risk.

- **Build flexibility into project delivery early**
  Bring logistics teams into design and procurement, test alternative routes and facilities, and set realistic schedules and contract terms around available capacity and risk.

- **Put technology and talent to practical use**
  Better data and visibility can improve decisions, while existing platform capabilities may be underused. Developing the next generation of logistics professionals strengthens the ability to respond over the long term.

“Uncertainty is no longer a temporary disruption we wait to pass. It’s our way of life today.”

Grant Wattman
President, Jade Management Group Inc.

INSIDE THE SESSIONS: THREE DEFINING CONTENT PILLARS

All sessions on the **Breakbulk Live** and **Breakbulk Voices** stages were grouped by their primary focus; many connect across all three content pillars.

Content Pillar 1 | Energy Projects

LNG, data centers, nuclear power and industrial developments are creating new opportunities for project cargo. Across the sessions, the message was clear: delivering these projects will require early logistics involvement and long-term planning to ensure vessels, infrastructure and skilled labor are available when needed.

The US LNG Buildout: Energy Security and the Next Wave of Projects

- Moderator Amanda Duhon identified 54 U.S. LNG projects worth $416.5 billion, but the pipeline spans execution-ready proposals through early-stage concepts. Its headline value is therefore a range of possible future capacity, not a delivery forecast.
- Buyers increasingly weigh security, diversification and flexible offtake alongside price. For developers, gas supply, contractors, fabrication, labor and logistics all affect bankability and schedule, making execution capacity a strategic constraint rather than a downstream task.

> *"Execution capacity is becoming just as important as project ambition."*
>
> **Amanda Duhon** , VP & Regional Director, North & Central America, Energy Industries Council (EIC)

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Building Project-Ready Industrial Hubs

- A site becomes investable when infrastructure, utilities, permits, transport access, workforce and community readiness align. "Shovel-ready" claims need to be backed by due diligence that identifies what is complete and what remains uncertain.
- Early logistics review can test road, rail, waterway and site constraints before a location is chosen. The broader lesson is that logistics readiness is part of site selection: discovering a constraint after a lease or investment decision can erase the advantage of speed to market.

> *"The timeline to get a site development ready or for a site to already be development ready is more critical than ever."*
>
> **Janet Galati,** Vice President, Energy Sector Growth, Greater Baton Rouge Economic Partnership

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Live Podcast Recording: An Inside View of the Data Center Boom

- Data center construction compresses complex deliveries into tight energization windows. High-value power equipment, hazardous batteries, constrained site access and long lead times make shipment visibility and reliable handoffs central to schedule control.
- The discussion reframed logistics as an upstream project partner: late access plans, crane availability or sequencing changes can delay commissioning even when equipment is ready. Contingencies are most useful when they are specific to the site and agreed before dispatch.

> *"Schedule slippage is something that we're just allergic to... You cannot let the schedule slip. There's just too many consequences."*
>
> **Andrew R. McNamara** , Director of Global Logistics, ON.energy

Data Centers, Power Demand and the New Infrastructure Race

- Data center growth is competing for power, vessels, labor, modular capacity and project logistics at the same time. The limiting factor can shift from cargo movement to available electricity, permitting, cooling or site capacity.
- Modularization and standardization can make delivery more repeatable, but only if modules arrive in the right sequence and the receiving site can install them. The schedule is therefore a system of dependencies, not a freight deadline in isolation.

> *"Data centers are becoming the next industrial technology needed for society to exist."*
> **Kevin Smith**, Sr Director, Modularization Portfolio, Cloud Operations + Innovation, Microsoft

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Future Thinkers Super Session: Future-Proofing Project Logistics with Industry Leaders

- A large pipeline in LNG, power, grids, data centers and critical minerals will put competing demands on vessels, ports, heavy-haul equipment and skilled labor. Planning shipment by shipment cannot create capacity quickly enough when many projects need the same assets at once.
- The panel called for earlier logistics input, long-range capacity planning and partnerships that survive beyond a single move. Port and route alternatives, cyber response and capacity triggers are useful only when stakeholders agree who acts, when, and with what resources.

> *"We have to move from reactive logistics to strategic asset and capacity positioning."*
> **Henrik Hansen**, General Manager, AAL Shipping (AAL) Americas

Nuclear Logistics and the Rise of SMRs

- Small modular reactors may be smaller than conventional nuclear plants, but key components still demand heavy-haul routes, specialized lifting and sometimes years of infrastructure preparation. The name "small" can obscure the scale of the transport challenge.
- Logistics, transportability, fabrication capacity and workforce planning need to shape concept design. Standardized modules and repeatable projects could reduce uncertainty, but only if the industry maintains skilled teams and a sustained pipeline between deployments.

> *"People are going to where the next opportunity is. But if everybody's jumping from one to the other, your quantity of people is still the same, and we're not fixing the problem. All we're doing is pushing the problem to somebody else."*
> **Kris Meyer**, Director, Advanced Nuclear Market Development, Barnhart Crane & Rigging



Content Pillar 2 | Risky Business

From shifting tariffs and disrupted routes to infrastructure risks and workforce shortages, project logistics faces challenges on multiple fronts. Across the sessions, the focus was on building resilience through earlier planning, workforce development, better asset information and technology backed by human judgement.

Inland & Multimodal Logistics Across the Americas: The Decisions That Make or Break Projects

- Road, rail, port and waterway moves depend on accurate drawings, weights, dimensions and center-of-gravity data before equipment or routes are committed. A missing detail can turn a planned move into a clearance, securement or infrastructure problem in the field.
- Infrastructure conditions and specialized capacity change, so route checks need to be repeated and alternatives kept viable. Early coordination across modes can cost more upfront, yet reduce the risk of late redesign, emergency equipment sourcing and schedule slippage.

> *"Engaging with transportation as early as possible is key to having a successful shipment."*
> **Kelli Collins,** Sr. Vice President, SRT Transportation Solutions

The Next Generation Takeover: Talent, Trust and the Future Workforce

- The workforce pipeline begins before university recruitment: students need exposure to the variety of careers across logistics and maritime operations. Mentorship, site experience and practical assignments help turn awareness into capability.
- Retention depends on trust, flexibility and respectful teams, paired with clear accountability. Emerging professionals can take on meaningful work sooner when they receive context and support; they also need to question and verify AI-generated output rather than accept it uncritically.

> *"We learn a lot as well when someone puts a vote of trust in us."*
> **Maria Laura Salazar**, Manager, BIMCO Americas

Digital Twins: Smarter Port Asset Management

- Ports often manage legacy assets through fragmented records, periodic inspections and knowledge held by long-serving employees. When condition and maintenance data are missing, deterioration can stay invisible until it affects operations or requires urgent capital spending.
- Combining inspections, GIS, historical records and staff knowledge can help prioritize maintenance and explain investment needs. The value comes from the decisions the information enables, not the digital model alone; data capture must become part of how every new asset is managed.

> *"Not having a life cycle, not understanding the proper workings of assets, really makes you blind to what you need long term and to the right investment."*
> **Paul Matthews**, VP, Port Assets and Strategic Partnerships, Bowman Consulting Group Ltd

AI From the Inside Out

- AI can reduce repetitive customs classification and documentation work, but regulated decisions need traceable evidence, domain knowledge and human review. A faster output is not useful if users cannot understand how it was reached or who is accountable for errors.
- As automation takes on initial processing, staff can shift toward validating exceptions and classifications. Practical deployment therefore depends on clear liability, secure data handling, reliable guardrails and trained reviewers who know when to challenge the system.

> *"We encourage humans to review the tools. We're not replacing humans... and that human element is on your side."*
> **Gerard Rique**, Manager – Innovations and Solutions, Ramps Logistics Limited

Planning in the Fog: Risk, Tariffs and the Cost of Resilience

- Rapid tariff changes make classification, country-of-origin records and contract language immediate project controls. The financial exposure can cascade beyond duties into sourcing decisions, client commitments, service-provider costs and delivery schedules.
- Speakers discussed bonded storage and duty deferral as options, while emphasizing that importers and brokers retain responsibility for declarations. Clear allocation of tariff risk and well-kept evidence matter because a mitigation strategy cannot remove uncertainty or compliance obligations.

> "The tariff playing field is obviously shifting every day."
> **Curtis D. Spencer**, CEO, IMS Worldwide, Inc

Beyond the Chokepoint: In Conversation with Mohammad Jaber

- Disruption around the Middle East reaches far beyond the region through route choice, insurance, vessel availability, commodity prices and cargo delays. Avoidance can add weeks to a voyage, while waiting for conditions to normalize can leave critical projects exposed.
- Resilience needs to be rebuilt through alternative routes, redundancy and working relationships that can be activated quickly. Jaber's central challenge was to replace a wait-and-see posture with adaptation and productivity, accepting that uncertainty may persist through recovery.

> *"The cost of standing still is incredibly high."*
> **Mohammad Jaber**, CEO, Combi Lift Project Logistics MEA

Breakbulk Studios: Interview with Alan Robb, International Longshoremen's Association

- Consistent core crews can build familiarity with vessels, terminals and work routines, supporting productivity and safer execution. Flexible staffing can then help employers scale labor around daily demand without rebuilding the operating team each time.
- The discussion also highlighted shortages and the need to make waterfront careers visible to new workers. Training, dependable work and a strong work ethic are part of the labor strategy, alongside a clearer understanding of how employers and crews share the gains from experience.

> *"You need two things. You need a pair of work boots, and you need a good work ethic."*
> **Alan Robb**, President, International Longshoremen's Association (ILA) South Atlantic & Gulf Coast District and Commissioner, PHA Port Commission



Content Pillar 3 | Trade Horizons

Mineral supply chains, proposed gateways and potential shifts in manufacturing are opening up new possibilities for where and how cargo moves. Across the sessions, the focus was on connecting regional supply chains and aligning port, inland and vessel capacity with future demand.

Keynote: What Gets Built and Why

- Frame trade as a connected network: carrier investments, infrastructure plans and local policy can signal where demand is moving. Those signals need to be read alongside the ports, transport, warehousing and workforce required to make projects viable.
- Disruptions can spread through that network with a lag. A shortage of one critical input can halt production, while higher logistics and materials costs may surface months later. Examples given during this keynote presentation point to resilience as spotting pressure early, adjusting routes and partners, and using relationships across the network to find options.

> *"Trade navigates the bluster because trade's a physical body. Trade is agnostic. Trade always tells the truth."*
> **Lori Ann LaRocco**, Global Trade & Supply Chain Expert, Author & Former CNBC Global Logistics Reporter; President, LaRocco Consulting

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Critical Minerals and the New Americas Supply Chain

- A resilient minerals supply chain must connect extraction with processing, energy, transport, finance, manufacturing and workforce development. Treating each mine as a standalone project misses the regional infrastructure and commercial links needed to move material into use.
- Regional cooperation, patient capital and local engagement can address remote sites and supply gaps, but infrastructure and power need to be planned before production scales. The session framed the Americas as an interdependent system whose resilience depends on coordinated investment.

> *"The Americas must start thinking as a system."*
> **Lyle Effio,** Founder & Strategic Advisor, Notable Bridging Solutions

Corpus Christi's Next Chapter: Building a New Gulf Coast Gateway

- A proposed container gateway at Corpus Christi was discussed as an additional option for a market where demand may outpace existing capacity. Its channel depth, highway access and rail links provide a basis for evaluating service to South Texas and northern Mexico.
- The broader case is about redundancy and the surrounding ecosystem, not a simple contest between ports. Construction and operating timelines remain years away, so the value will depend on demand growth, inland connectivity and how the new capacity fits with other Gulf Coast gateways.

> "Corpus Christi can bring the resilience, the redundancy and the optionality that the market needs right now."
> **Yudi Takizawa**, Chief Commercial Officer, Port of Corpus Christi

Fleet Decisions in an Era of Strategic Demand

- Effective vessel capacity tightens when voyages take longer, whether because of rerouting, congestion, canal limits or port delays. The constraint is not simply the number of vessels in the world; it is how long each ship remains unavailable for its next cargo.
- Project owners and carriers can reduce exposure by forecasting demand earlier, coordinating customer needs before newbuild decisions and assessing whether both ports can handle a vessel. Flexible vessel choices and alternative routes matter alongside nominal fleet size.

> *"It's not that there's not enough vessels, it's that the vessels are taking longer per voyage based on routing."*
> **Philip Brown**, BGL Global Chartering Manager, Bechtel Global Logistics

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What If? Mapping the Future of American Manufacturing

- Looking ahead to 2030, the panel explored possible scenarios to test how inland cargo hubs, U.S. manufacturing and earlier logistics input could reshape project flows. Inland staging may relieve port congestion and simplify some permitting, but it also moves planning decisions upstream into engineering and procurement.
- Scenario planning is useful when it produces actions: shared risk assumptions, clear measures, backup plans and named decision points. The discussion also challenged collaboration as an abstract promise, arguing that responsibilities and information flows need to be designed into the work.

> *"Disruptions, as they say, become more structural and not episodic."*
> **John Hark**, Chartering Director – North America, Bertling Logistics & Adjunct Professor, Texas A&M



KEY TAKEAWAYS

FROM INSIGHT TO OPERATING PRIORITIES

Across both stages, a consistent message emerged: successful project delivery depends on early planning, realistic capacity assessments and the ability to adapt. **Six practical takeaways** bring these ideas together...

01 Plan earlier across the full route

Bring logistics, ports, carriers, engineering, fabrication and site teams into planning before design and procurement choices narrow the options. Confirm route, lift, staging, permitting and labor assumptions together.

02 Build capacity around credible demand

Separate projects by maturity and timing. Use credible LNG, grid, critical minerals, data center, nuclear and manufacturing pipelines to inform long-term investment in vessels, heavy-haul equipment, ports, storage and inland hubs.

03 Make resilience contractual and physical

Agree how tariff swings and schedule changes affect costs and responsibilities. Identify alternate routes, bonded or foreign-trade-zone options, laydown space, storage and escalation paths before disruption occurs.

04 Treat power and site readiness as logistics inputs

For data centers, LNG, nuclear and industrial sites, validate power, cooling, permits, access and commissioning windows alongside cargo plans. Site readiness depends on seeing these requirements together.

05 Protect operational knowledge

Capture asset and route data before experienced employees leave. Pair new professionals with mentors, use site visits and structured debriefs, and turn mistakes into training and process improvements.

06 Adopt technology where it improves a decision

Digital twins, AI agents and field-data tools are most useful when they make classifications, asset condition, route constraints and responsibilities easier to see, verify and act on.

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