



CARIBBEAN SHIPPING ASSOCIATION

Caribbean MARITIME

ISSUE No 47

OCTOBER 2022 - JANUARY 2023



Jamaica

Logistics and
investment

Tall ships

Stop off in style

Puerto Rico

Special Report



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MISSION STATEMENT

To promote and foster the highest quality service to the maritime industry through training development; working with all agencies, groups and other associations for the benefit and development of its members and the peoples of the Caribbean region.

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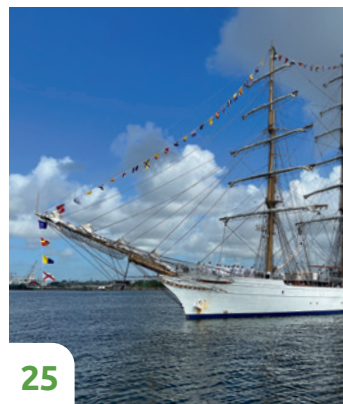
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CSA

FROM THE CSA PRESIDENT

CARIBBEAN SHIPPING ASSOCIATION

Addressing post-pandemic challenges

The challenge of this industry, and others, will be to effectively maneuver the after-effects of a pandemic that has influenced and reshaped the way we do business as individuals and entities for more than two years.

It is a difficult test to be confronted by particularly in a reality where Covid-19 continues to play a significant role in how the maritime sector operates and responds to related issues. It was against this backdrop that I assumed responsibility of leading the Caribbean Shipping Association (CSA) as its president in January, a role which is undoubtedly a privilege to be entrusted with.

Hardworking

Throughout this period, one idea always rang true – “the whole is greater than the sum of its parts”. The entire sector, its companies and their hardworking teams, and the incredibly supportive executive of the CSA, have proven that we are indeed a resilient and pioneering industry.

When the pandemic hit, our initial response was to migrate to a wholly



Marc Sampson
President
Caribbean Shipping Association

digital space that ensured we continued to engage our members and non-members in meaningful, impactful ways. In doing so, our Annual General Meeting and Caribbean Shipping Executives' Conference (CSEC), trainings and stakeholder discussions became virtual. While they could not





“ The whole is greater than the sum of its parts”. The entire sector, its companies and their hardworking teams, and the incredibly supportive executive of the CSA, have proven that we are indeed a resilient and pioneering industry”



replicate the familiar warmth of our in-person gatherings, it guaranteed that the essential work we foster and enable continued.

After two years of this novel but practical format, we were able to physically stage the CSEC in Doral, Miami in May to enormous support and success. This response, and the measures implemented to promote health and safety, was a buoyant display of what is possible as a region. And we look forward to carrying this jubilant demonstration to San Juan, Puerto Rico which will host the CSA's 52nd Annual General Meeting,

FROM THE CSA PRESIDENT

CARIBBEAN SHIPPING ASSOCIATION

Conference and Exhibition from October 31 to November 2, 2022.

My tenure as president also coincides with the first reports of the Caribbean Research Institute (CRI), the brilliant outcome of successive CSA General Councils' efforts to provide data and analyses on regional trade, transport, and ports to address information gaps. This is an initial but substantial step forward in our mission to provide region-specific data which can lead our operations through informed decision-making.

I am particularly pleased with the resumption of the Association's training workshops which, throughout our productive five-decade presence, have been fundamental to our mission of advancing the regional maritime sector through the personal and professional development of its members. Two well-endorsed courses – Negotiation Skills and Managing Conflict with Customers and Coworkers – were facilitated by the Caribbean Centre for Conflict Management in September. These much-needed coaching interventions will redound to the benefit of its participants and their respective organizations.

Partners

It would be remiss of me to neglect mention of several valued partners who comprise the CSA Platinum Network and whose vital support have aided the Association's efforts throughout the year. All we have achieved would not be possible without the unwavering collaboration of The Shipping Association of Barbados, Kingston Wharves Ltd, Boskalis, Shipco Transport, Tropical Shipping, TOTE Maritime and Svitzer. We hope your confidence in our vision and the work of the Association will continue and encourage others to likewise join as we build on the countless accomplishments since our establishment.

“ I am particularly pleased with the resumption of the Association's training workshops which, throughout our productive five-decade presence, have been fundamental to our mission of advancing the regional maritime sector through the personal and professional development of its members”



As we approach the year's end and anticipate the start of another, I am heartened by the proposals and actions of the CSA, its membership, and the industry at large. Our goals are lofty, the vision clear and our drive to realize them are at an all-time high.

Stay safe and focused.

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A man in demand

William Brown

William Brown came into the shipping sector by accident rather than by design and thanks to his ability to crunch the numbers. His financial, analytical, and auditing skills being much appreciated at Lannaman & Morris in Jamaica. As his résumé clearly demonstrates, he is someone in big demand but someone who's always been willing to devote his time, energy, and expertise to a range of organizations, including the Caribbean Shipping Association. Here he speaks to Caribbean Maritime about his career and, with a surprising recent job change, his plans.

Q. Where were you born?

A. I was born in Cascade, a rural town in Hanover, Jamaica.

Q. What did your parents do for a living and what influence did they have on your early life?

A. Cascade is a small town nestled in the hills of Hanover. On the coast, there were the Round Hill and Tryall hotels in the east and Negril with small beach hotels to the west. Lucea, the capital of Hanover was located in the middle, it had the high school, hospital, and a factory that manufactured baseballs. Everywhere else were farms.

We were farmers.

My parents impressed on us that a sense of purpose, responsibility and selflessness should be the hallmarks of the way we conducted ourselves. We understood that our duty was to family and community. They taught us that selflessness was an important part of leadership, taking others along with you as you grew.



A new maritime resource for the Caribbean



Caribbean Research Institute (CRI) Report



The Caribbean Research Institute (CRI) has been launched to meet a need for specialized regional research that can provide maritime data and analyses that are vital to modern, knowledge-based economies.

The CRI is producing a series of in-depth reports and these are now available to purchase.

The CRI's first report provided an in-depth look at regional trade and services, particularly within the context of the pandemic. It also presented an

outline of some of its primary findings as it related to trade, transshipment, and regional connectivity.

All future reports will aid in providing context for the importance of region-specific data that can guide decision-making, encourage greater efficiency, and promote productivity.

Please contact **Milaika Capella-Ras** at the Caribbean Shipping Association (CSA) for a breakdown of costs, specials, and subscription fees available to both members and non-members.

To pre-order the report, email cri@caribbeanshipping.org

www.caribbeanshipping.org

The idea that we could achieve goals based on self-belief, discipline, and commitment to the task was a constant reminder

Q. Where did you go to school?

A. I attended Rusea's High School in Lucea, Hanover.

Q. What about college or university? In what subject(s) did you graduate?

A. I graduated from the University of the West Indies in 1987 with an honors degree in Accounting. In 1990 I graduated from the Association of Certified Chartered Accountants (ACCA) Accounting Consortium for Professional Accountants, and was admitted to public practice in 1992.

Q. So, as someone who left university with a degree in accounting, did you ever see a career for yourself in the maritime sector?

A. I saw myself at the forefront of governance, strategy and policy making, using my technical skills as the basis for decision making. However, it was the auditor in me that brought me to the maritime sector.

Q. Following graduation, you subsequently attended the Forum for International Trade Training in Ottawa. Sometime later you moved back to Canada with your wife and children. Did you and your family enjoy the time in Canada and how did you personally benefit from your time overseas?

A. I didn't physically study in Ottawa. I attended the Forum for International Trade Training via correspondence/online.

The time spent in Canada was a special time for our family. We moved to Ottawa while my wife, Dr Charmaine Watson-Brown did her fellowship in Nephrology at the University of Ottawa. Our three children, Stefan, Dominic and Jada, continued school there and pursued their chosen interest – swimming. All three became national swimmers.

We bonded together strongly as a unit and have fond memories of our time spent there. Ottawa brought a new dimension to our family life. The children were able

to see a different side of me as a father, and I, in turn, had more time to help them grow and develop during critical points in their life.

I continued working remotely with the Anti-Dumping and Subsidies Commission; Jamaica's international trade tribunal doing international trade forensics.

Ottawa remains one of my favorite cities in the world.

Q. After you returned to Jamaica in 2004 you joined leading local diversified maritime group Lannaman & Morris (Shipping). How did this come about?

A. I had done some work for the company prior to going to Canada. On my return home to Jamaica, the late chairman, Harriat Maragh invited me to join his team.

Q. During this early period with Lannaman & Morris Shipping you were also involved with special projects for Seafreight Agencies (since acquired by Crowley) – a carrier for which Lannaman & Morris Shipping acted as agent. What did this work involve and where did it take you?

A. I supported Seafreight Line and its related companies, Seatruck and Seafreight Agencies. I provided independent financial analysis of performance data and made recommendations for improving profitability for various entities including the trucking operation.

I was also the line's agency auditor, providing audit support for agencies and sub-agencies in the Caribbean and the US for Seafreight Line.

Q. Five years later you were appointed group managing director at Lannaman & Morris Shipping? How difficult was it to make the step up to the top position at the company?

A. It was a smooth transition to the

“One of our main areas of focus was to restructure and expand the management core. I am quite proud that the management core quadrupled during my tenure as Managing Director”



position of Group Managing Director. I had acted in that capacity while the position was vacant for a few years, along with my role as Financial Controller. When I was appointed Managing Director, my role remained dual as I continued as the Chief Financial Officer.

Q. What were your main achievements during your time as managing director of Lannaman & Morris Shipping?

A. Many would say that the 1000% growth in the value of the company would be our greatest achievement while I was Managing Director. However, I maintain that the greatest success we achieved was the professional growth and development of our employees.

One of our main areas of focus was to restructure and expand the management core. I am quite proud that the management core quadrupled during my tenure as Managing Director with many of our managers rising from the clerical levels.

Q. As Jamaica's leading cruise shipping agent (representing around 75% of local cruise ship calls) how did Lannaman & Morris Shipping get through the Covid-19



“ It has been my greatest honor to serve in these roles. Over the past 80 years, the Shipping Association of Jamaica has done much to strengthen and expand the industry”

pandemic and how easy or difficult was it to bounce back as the industry returned to normal?

A. It was not easy. It took incredible sacrifices and some tough decision making to mitigate the effects of losing over 50% of our revenue overnight.

Our first order of business was to determine priorities and to ensure that whatever actions we took would not adversely affect a smooth transition when the industry returned to normal.

As much as possible, we aimed to keep our team intact.

Q. You have recently exited your role at Lannaman & Morris Shipping, so what's next?

A. I will be concentrating on expanding my footprint in the industry, only now under my family's estate planning company Cascades Ventures & Equities Limited. We are currently rolling out infrastructure and offices in Jamaica and the US.

Q. In 2020 you were elected president of the Shipping Association of Jamaica. You

also were previously deputy chairman of the board of directors of the Maritime Authority of Jamaica and chair of the Government's Enterprise Committee for the Privatisation Jamaica's Ship Registry. In addition, you serve on numerous corporate boards in Jamaica. What do you believe you bring or have brought to the various roles?

A. In these various leadership roles, I believe that my greatest contribution is in the area of decision-making.

While I do have the technical skills in accounting, forensics, finance, international trade and now shipping, I feel strongly that it is my adherence to fairness, visionary thinking, and my aptitude for policy making that have led to my involvement in these organizations.

It has been my greatest honor to serve in these roles. Over the past 80 years, the Shipping Association of Jamaica has done much to strengthen and expand the industry. It has been the pinnacle of my professional career to serve as the President, and I am honored to be a part of its legacy. Serving as President of such

a vital organization, has only strengthened my belief that service beyond self brings the greatest rewards.

Q. After serving with distinction as Group D (Logistics & NVOCC) chairman, you have recently become the CSA's Vice President. What do you hope to achieve during your time in this role within the Association and while working alongside President Marc Sampson?

A. First and foremost, we have to be of value to our members. We recently established the Caribbean Research Institute, which provides statistical data on ports and trade in the Caribbean. By Caribbean, I mean the greater Caribbean, which includes the US Gulf Coast and Florida, the countries in Central and South America that border the Caribbean Sea, and the islands in between.

We believe that fostering and improving trade relations within the CSA will allow for an increase in trade and collaboration between the CSA and the wider global shipping community. With this in mind, we aim to improve the recognition and influence of the CSA globally.

Q. As a former vice president of the Jamaica Golf Association, what's your favourite course in Jamaica?

A. Tryall Golf Club is my favourite course, even though I have not played it in a while. It was the first course on which I broke 80 many years ago.

Q. Beyond work, what are your main interests and hobbies?

A. Beyond work, I am integrally involved in the Rusea's Class of 1980 alumni association. It is always a pleasure going home to the mountains and rivers of Hanover, where my mother and I provide support and funding to educating children in the community.

I also enjoy playing golf.

Additionally, my passion is my family and I spend as much time as I can with my grandchildren, Mia and Odin, in Florida. I am a farmer by nature, so I also spend time at my plant nursery in Southwest Ranches, Florida.

Caribbean Maritime

PUERTO RICO

Special report



This year the Caribbean Shipping Association (CSA) holds its 52nd Annual General Meeting in San Juan, Puerto Rico. It will be the fifth time that San Juan has played host port to the popular event. To coincide with the AGM, Caribbean Maritime talks to the new operators of San Juan Cruise Port and to its new general manager Federico Gonzalez-Denton.

New-found optimism comes to San Juan



Puerto Rico has had some tough times in recent years, the devastating impact of Hurricane Maria in 2017 and most recently from Hurricane Fiona. Plus, the Commonwealth has labored under a government-debt crisis that began back in 2014 and only effectively came to an end in March this year when Puerto Rico exited bankruptcy.

Notwithstanding Fiona but with the debt crisis officially behind it, Puerto Rico is fast bouncing back and as the CSA gathers in San Juan there is a new-found optimism among the island's business and maritime sectors especially in San Juan port.

Much of this optimism is down to the decision to concession San Juan's cruise operations.

It's been a long time coming. And three years after originally submitting a bid, Global Ports Holding Plc (GPH) – with headquarters in Istanbul, Barcelona, and London, and a regional head office in Nassau, Bahamas – and the world's largest independent cruise port operator, signed a 30-year concession agreement in August with the Puerto Rico Ports



Happy 52ND Birthday CSA

& Puerto Rico Shipping Association



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Authority (PRPA) to run San Juan Cruise Port. This ground-breaking deal followed a competitive procurement process managed by the Puerto Rico Public-Private Partnership Authority. There were two other bidders for the concession: Puerto Rico Cruise Terminals Partners and San Juan Cruise Terminals Partners. GPH is due to commence operations in early 2023.

This agreement marks a significant development in GPH's strategic plans for the Caribbean, which already comprises cruise terminal management deals in Antigua, Havana, and Nassau. San Juan Cruise Port is expected to become the third-largest cruise port in GPH's extensive global network which currently stretches across the Mediterranean, Portugal, Denmark, and the Far East.

From GPH's perspective, San Juan Cruise

Port is handily positioned to be included in both eastern Caribbean and southern Caribbean cruise itineraries. As the Caribbean Shipping Association can testify by choosing San Juan for its AGM, it's also a world-class destination.

But San Juan's apparent pre-Covid success hid some serious shortcomings and the port's infrastructure has been in need of an upgrade for some time. Hence, the decision by the PRPA to concession the cruise operations.

Destination

San Juan Cruise Port Designated General Manager Federico González-Denton explains to CM: "San Juan's history in the cruise industry dates to the 70s and 80s. At that time San Juan was one of the most attractive destinations in the Caribbean

and the world. Moreover, San Juan was a key destination in the creation of the cruise industry as we know it today. However, over the years, the government stopped making the necessary improvements in infrastructure and product development to catch up with other destinations and advances in the industry. This was largely due to the government's precarious fiscal

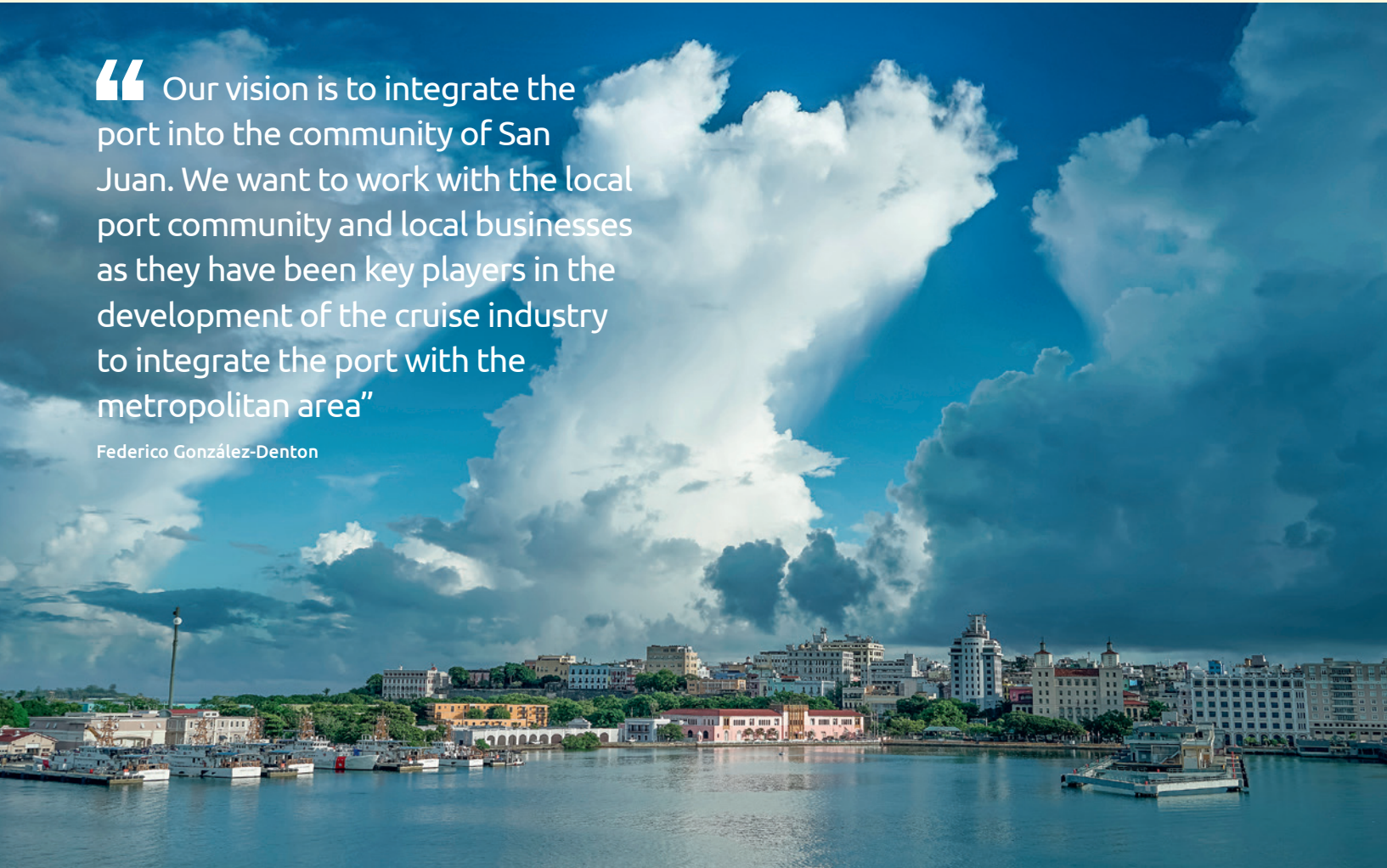


Federico González-Denton



“ Our vision is to integrate the port into the community of San Juan. We want to work with the local port community and local businesses as they have been key players in the development of the cruise industry to integrate the port with the metropolitan area”

Federico González-Denton



situation. This deterioration accelerated with the bankruptcy of the government, the tremendous damage caused by Hurricane Maria (both in 2017) and the beginning of the pandemic in 2020.”

And this is where GPH with its deep pockets comes in and its enviable track record of securing the significant levels of private-sector funding needed for the much-needed upgrade and expansion while generating revenue for the PRPA.

González-Denton says work will be funded via a solid and long-term project financing structure. “San Juan Cruise Port is going to issue long-term project financing in the form of Project Activity Bonds and/or private placements which will fund all

committed investments.”

During an initial investment phase at Old San Juan, GPH will spend around US\$ 100 million, with the emphasis on critical infrastructural repairs to Piers 1 (two berths) and 4 (two berths) and across the San Antonio Channel a further two berths at the Pan American Piers which are located alongside Isla Grande Airport, as well as upgrades of the terminal buildings and the passenger walkway. This refurbishment phase should last around 24 months.

Revenue

In addition to the investment and revenue generation, GPH is paying an upfront concession fee of US\$ 75 million to the

PRPA, which includes an advance payment of US\$ 1.6 million for dredging work. After the third year, San Juan Cruise Port will also make annual contributions between US\$ 0.31-0.41 million for maintenance dredging. An annual share of 5% of gross revenues from port operations was also agreed. This 5% can increase if certain metrics established in the contract are met.

A second investment phase is planned, but is subject to certain pre-agreed criteria, including cruise passenger volumes recovering to pre-pandemic levels. In this phase, GPH will invest an estimated US\$ 250 million in expanding the capacity of the cruise port by building at Piers 11 and 12 a completely new and state-of-the-art



homeport terminal capable of handling the world's largest cruise ships. These two piers were previously used to handle general cargo.

As well as investing in the port's infrastructure, GPH is also set to modernize the visitor experience for cruise passengers, cruise ship operators and local vendors. The company will use its vast expertise to improve the management of the cruise port operations as well as its operational performance while ensuring environmental protection, safety, and security.

Undersold

It's fair to say that San Juan has, perhaps, been undersold in the past and one of the key tasks for GPH's destination marketing team is to work with port management and local stakeholders to promote the many unique attractions Puerto Rico offers. As González-Denton says: "We want small local businesses to be able to introduce new offers through the Guest Information Centers (GICs) which consists of Exclusive Information Centers and Public Information Centers to offer all kinds of information to passengers. In coordination with the Puerto Rico Tourism Company, we aim to establish GICs to provide passengers with information about San Juan and Puerto Rico, provide aid and gather feedback. We also aim at establishing synergies with recent developments in the area such as Bahía Urbana, the T Mobile District, and other projects to maximize the economic impact in the area."

In fact, local economists estimate that the San Juan Cruise Port project will contribute approximately US\$ 14 billion to Puerto Rico's economy over the 30 years of concession through government revenue, jobs and business opportunities and more.

While independent cruise experts are saying they believe that the current

Partnership selected

Global Ports Holding Chairman and CEO Mehmet Kutman says: "I am delighted that the Government of Puerto Rico has selected GPH for this public-private partnership to improve and expand San Juan Cruise Port. The addition of this strategically significant location to our cruise port network marks a further important step in our growth strategy and will grow cruise passenger volumes across our network to over 16 million passengers per annum.

"I welcome San Juan Cruise Port into the world's largest cruise port

network. The GPH team looks forward to working in partnership with all stakeholders to refurbish and reinvigorate this leading cruise port to create a world-leading cruise port experience for the benefit of all stakeholders.

Our work to transform this port will see hundreds of millions of US dollars invested into San Juan Cruise Port, all financed by private capital. Our plans include building a new cruise pier, a state-of-the-art cruise terminal and significant enhancements to the public infrastructure."



SAN JUAN CRUISE PORT

San Juan Cruise Port is made up of Old San Juan (seven berths) and the Pan American Pier (two berths) already well established and handled 1.8m unique pre-Covid passengers in 2019 (including c. 0.4m homeport passengers or 2.2 million passenger movements in total). This contrasts, for example, with only around 159,000 cruise passengers visiting Old San Juan in pandemic-hit 2021 – or just 15 cruise ship calls. This was the lowest figure recorded for many years.

passenger volume in San Juan has the potential to increase to over five million by the end of GPH's 30-year concession.

As GPH gets to work improving San Juan's cruise facilities, the US Army Corps of Engineers, and the PRPA are laying the groundwork later this year for improved maritime infrastructure which both parties believe will help lower energy costs and enhance the area's environmental quality.

Projects

PRPA Executive Director Joel Pizá says the Federal Government-backed US\$ 60.5 million project — for which the Authority is contributing US\$ 15 million — includes several key phases that will improve the depth and breadth of the different areas of the harbor. Disappointingly, the project has taken 16 years to come to fruition.

A key feature of the upgrade is to the Army Terminal Channel, which is used

“ PRPA Executive Director Joel Pizá says the Federal Government-backed US\$ 60.5 million project — for which the Authority is contributing US\$ 15 million — includes several key phases that will improve the depth and breadth of the different areas of the harbor”

by liquid bulk vessels discharging fuel to berths in San Juan and the neighboring municipality of Cataño where there is a ferry terminal. That channel is being dredged from a depth of 40 feet (12.2 meters) to 44 feet (13.4 meters), opening the way for larger ships to access the port. The need for a deeper access channel reflects a shift towards larger vessels and particularly for those carrying gasoline, jet fuel, diesel, liquefied petroleum gas (LPG) products, and liquefied natural gas (LNG).”

The restrictive nature of the bay and harbor also impacts on cruise ship traffic, as there are maneuverability issues that increase time in the harbor and prevent larger ships from docking in San Juan. “That creates environmental problems, because the longer it takes for the ships to maneuver, they use up more diesel and generate more toxic emissions,” said Executive Director Joel Pizá-Batiz, who added that quicker transit times also mean an increase in the number and size of ships visiting San Juan.

The project will happen in five phases starting in October 2022 and should take about 18 months to complete, Pizá-Batiz said. The USACE will award the contracts to the firms involved in completing the different tasks and will oversee the arrival of the equipment and machinery needed, which does not exist in Puerto Rico. The work should not affect maritime traffic in San Juan Harbor.

Dredging

After the dredging work is completed, the USACE will contract companies to perform maintenance work every five years, Pizá-Batiz said.

In the meantime, big-four accounting firm Ernst & Young (EY) has taken an in-depth look at the sometimes-controversial Jones Act, to which the majority of Puerto Rico's seaborne trade is inextricably tied and given the federal statute the thumbs up.





EY evaluated the Jones Act and its impact on freight rates, container availability, port congestion, and carrier performance in the Caribbean relative to global averages. The study took a timeframe between January 2019 and December 2021 and during a period of heightened volatility of freight movement during the peak of the Covid-19 pandemic.

Performance

The study stated: “Across multiple metrics, shippers overwhelmingly associated better carrier performance with Jones Act carriers than non- Jones Act ones.” It also concluded that “in addition to providing stability and security in the region, the Jones Act shipping industry continues to provide substantial economic benefits to Puerto Rico.”

“Jones Act carriers are dedicated to Puerto Rico and help local businesses make goods more affordable and the supply chain more reliable compared to our global competitors,” said James L. Henry, Chairman and President of the US’ Transportation Institute. “While the entire global supply chain was disrupted during the pandemic, our Jones Act carriers proved to be 27 times more affordable and eight times more reliable than non-Jones Act carriers.”

A similar study by performed jointly by Reeve & Associates and Estudios Técnicos also concluded that the Jones Act has no negative impact on either retail prices or the cost of living in Puerto Rico.

A new vision for community

Not only will GPH be investing in physical improvements in San Juan, but the company also aims to enhance the visitor experience for cruise passengers calling or homeporting.

As González-Denton outlined: “Our vision is to integrate the port into the community of San Juan. We want to work with the local port community and local businesses as they have been key players in the development of the cruise industry to integrate the port with the metropolitan area. To this end we will be creating a ‘Steering Committee’ that will include the Puerto Rico Tourism Company and representatives of the municipalities of San Juan, Cataño and Carolina, Luis Muñoz Marín Airport and Isla Grande Airport.

The members of the committee will consider whether it is necessary to add additional participants. Its main objective will be to align the objectives among the members of the Steering Committee, develop a common strategy and establish general guidelines. This committee in turn will be nourished by the input of the working groups that we will be creating. These working groups will include top representatives from the cruise and tourism industries, including local representatives from shops, restaurants, hotels, and other local businesses from Old San Juan, Cataño, Puerta de Tierra and Condado, who will make recommendations to the Steering Committee.

NEW DESIGNATED GENERAL MANAGER FOR CRUISE PORT

Federico González-Denton is taking charge of San Juan Cruise Port and is excited about his new position. He told Caribbean Maritime: “For me to return to San Juan, Puerto Rico, is to complete a circle of life. I am Puerto Rican, and it is where my family is located, my roots. Making this comeback in the industry I love, that of cruise ships, to improve infrastructural conditions and elevate operations supported by the world’s largest cruise port operating company, GPH, is a dream come true.

“I am a maritime lawyer by profession and have been involved with the cruise industry for the last 15 years of my professional life. First as Vice President of Government Relations of Royal Caribbean Group in the Caribbean and Latin America for 12 years. Then I moved to Bogotá, Colombia and established my own

consulting firm, Gondens International Advisors, to help ports and destinations develop their cruise operations. One of my main clients was the operator of the cruise terminals in Colón and Amador, in Panama, Colon 2000 Group. Two years after operating my firm, I was contacted by Global Ports Holding, a company to which I have always been bound by strong ties of friendship, to offer to help them in their governmental relations in the Caribbean and Latin America, including with the project of the concession of the cruise port in San Juan. It was with great pleasure that I accepted this new assignment with the great joy that after a few months I was offered the position of Designated General Manager to operate its subsidiary in Puerto Rico, San Juan Cruise Port LLC.”



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Inside Jamaica's Expansion master plan



Can Jamaica really reinvent itself as a Caribbean Dubai or Singapore? Well, it's certainly making a every effort to do so and with full backing of the Jamaican Government and the Port Authority of Jamaica (PAJ).

And it's not just big talk and lofty plans. Jamaica's ambitions in the form of its Logistics Hub Initiative (LHI) have been apparent for some time and are now taking shape. Notwithstanding the extensive facilities already established by Kingston Wharves, the LHI is conceived to make Jamaica a major cargo trans-shipment and logistics base.

In August, Jamaica really showed that it meant business with the opening of the US\$ 17-million Kingston Logistics Park

(KLP). To enable the KLP to be created, the Government made available to the PAJ over 40 hectares of land immediately adjoining the Kingston Freeport Terminal.

Ceremony

So, it was no surprise when it was Prime Minister Andrew Holness who cut the ribbon at the opening ceremony. He predicted increased foreign exchange earnings for Jamaica. He also rightly emphasized during the inauguration that the Park represented a significant investment for the island. He expects the KLP to generate greater economic growth (it was a creditable 4.6% in 2021), boost forex earnings and create more high-quality jobs for an island where the unemployment rate

is, in any case, a far-from-troubling 6%.

Comprising 18,000 square metres of warehousing space, the KLP forms the first phase of the area's development. The Park includes a border-protection centre, containing the Jamaica Customs Agency (JCA) and the Container Security Initiative – a collaboration between the JCA and the US Government.

"This is a big step ...in [developing] a new industry that will create for us a new stream of foreign exchange revenues that will make our economy stronger and more robust and can withstand shocks, and that is why this is such a big deal," the Mr Holness said.

PAJ President and Chief Executive Officer, (PAJ), Professor Gordon Shirley,

“ But Jamaica has even bigger and more far-reaching logistics plans lined up in the form of the Caymanas Special Economic Zone (CSEZ)”

CSEZ MASTER PLAN

Working alongside the Planning Institute of Jamaica and the JSEZA, the Arlington, Virginia-based International Development Group (IDG) created the CSEZ master plan.

IDG's main objective was to prepare a comprehensive feasibility study for the CSEZ in Jamaica that considered the best uses (industrial, ICT, transshipment, commercial, worker housing, etc.) and development phasing of the 485 hectare CSEZ site. This was to be done in a manner that was financially feasible for a private developer, PPP, or other arrangement.

IDG collaborated on this work with subcontractor partners: Gensler, an international firm specializing in planning, urban design, sustainability, architecture, and branding; and the local Fluid Systems Engineering, a hydrology and engineering specialist.

added that the investment represented another significant contribution by the Authority in leveraging the opportunities in the sector to create economic growth and job creation.

Incubator

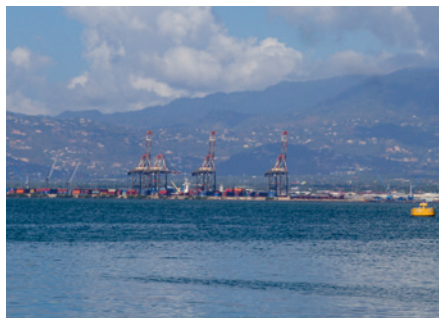
The KLP will act as an incubator/catalyst for potential logistics users of the Port of Kingston with a focus on warehousing and storage. The site is located within a Special Economic Zone (SEZ) and users of the facility enjoy certain tax incentives. The KLP

is the flagship industrial zone developed under the Special Economic Zone (SEZ) Act of 2016.

But Jamaica has even bigger and more far-reaching logistics plans lined up in the form of the Caymanas Special Economic Zone (CSEZ) – a project backed by the World Bank and under the umbrella of the Jamaica Special Economic Zone Authority (JSEZA).

The development of the CSEZ will again be led by the PAJ. As with the KLP, this key project has been identified as opportunity to help stimulate economic development, attract Foreign Direct Investment (FDI), encourage technological innovation and developments, and allow manufacturers to drive greater value for goods transshipped through Jamaica.

This is also government-owned land and handily located just off the recently upgraded six-lane Mandela Highway, which runs between Kingston and Spanish Town, and is close to the port.



Saudis look to Caribbean



It's not every day that a high-ranking delegation from Saudi Arabia arrives in a Caribbean country seemingly eager to invest in a multitude of projects, including those in maritime, logistics and cruise sectors.

But that's exactly what happened in July, when HE Dr Badr al Badr, Deputy Minister of the Ministry of Investment (with responsibility for investor outreach) rocked up in Kingston with a delegation of 70 top officials and apparently with check book in hand.

Major Chinese investment (see panel) often appears to come with some subtle strings attached and tend to form part of the nation's infrastructure financing Belt and Road Initiative, which can lead to debt-repayment issues for the recipient country. As such and with deteriorating Sino-US relations, many Caribbean states have become less willing to entertain Chinese investment and Saudi Arabia now

appears ready to step in. Nevertheless, China remains the region's top development partner. Yet there are some in the Caribbean who remain suspicious of Saudi intentions in the region.

And on what exactly in Jamaica are the Saudis planning to spend their money and what's in it for the Kingdom? For Saudi Arabia (and many other Gulf States) it's less about influence and ideology and more about image, and purely and simply seeking a return on investment for its sovereign wealth fund and as part of its 2030 national

diversification investment strategy.

In some way, the arrival of the Saudis coincides with Jamaica's own plans to become a major logistics hub. Around US\$ 300 million has been spent on the Port of Kingston, and there is growing emphasis on logistics (via the Global Logistics Hub Initiative) and the creation of special economic zones – including the proposed Caymanas scheme close to Kingston (see separate story this issue).

Back home, the Saudis have given such projects a high priority and the Kingdom plans to spend US\$ 147 bn on transport

VISITING OTHER INTERESTS

It's worth pointing out that the Saudi delegation did not only call in to Kingston, but also visited the Dominican Republic and Guyana as part of its July swing through the Caribbean. There's also Saudi interest in Belize and where the two nations have just established diplomatic relations.

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and logistics in the period to 2030. Saudi Arabia also expects to welcome 100 million tourists a year by the end of the decade.

And it's in this area where there is further scope for co-operation between Saudi Arabia and Jamaica, with the latter hoping to receive 100,000 tourists a year from the Kingdom by 2025.

Relationship

This burgeoning Jamaica-Saudi relationship is also set to be a two-way street, with optimism in Riyadh that ties with Kingston might boost cruise tourism opportunities in Saudi Arabia. The two nations recently signed an MOU to collaborate in the field of tourism.

Jamaica's tourism minister Edmund Bartlett has said that Jamaicans would be able to train Saudi cruise stakeholders to understand the nature of the business. The partnership, he said, could help create memorable shore excursion experiences, assistance with port infrastructure, and negotiations with cruise ship operators.

As it is Saudi Arabia's cruise tourism sector has been progressing steadily. There's even a Cruise Saudi promotional body.

Jamaica's prime minister Andrew Holness also appears particularly keen to



attract Saudi investors. He said: "We offer a very robust and very stable economic platform. We are an open... and... small economy. But with our strong fiscal positions, we have been able to withstand shocks," He added: "So, you have here, an economic platform that can receive investments and give economic certainty to your investments."

During his visit, Dr Al Badr, said that it was "especially important" for the group accompanying him, "because the Caribbean has become a priority zone for investments and business partnerships for Saudi Arabia". He further emphasized that

Jamaica, as the third largest economy in the region, "is a key partner, a key player and a key leader" in this regard.

Liaising

At the same time, Dr Al Badr met with Industry, Investment & Commerce Minister (MIIC) Senator Aubyn Hill. When contacted, the Port Authority of Jamaica told CM that MIIC was liaising with the Saudis. Yet it was the PAJ which hosted Dr Al Badr at a special luncheon at the Historic Naval Dockyard in Port Royal. This was followed by a presentation of local investment opportunities PAJ chairman, Alok Jain who also serves as a consultant to the Office of the Prime Minister.

Senator Hill said at the time of the visit: "We believe in the opportunities [available in] Jamaica and we very much want to develop the investments dialogue, which we have recently begun with you (Saudi Arabia). We feel that this visit is the start of [something] historic and is an excellent opportunity for you to see, first-hand, what we have to offer."

"Therefore, we are delighted because our meetings around will enable us to start examining ways and opportunities to build deeper investments, trade and business links between Saudi Arabia and Jamaica," he added.

PREVIOUS AMBITIONS

Let's also remember that in back in 2013 the Chinese (in the shape of the China Harbour Engineering Co) also came knocking on Jamaica's door with ambitious investment plans to build a new container terminal and industrial park on uninhabited Great Goat Island in the Portland Bight Protected Area.

The Chinese ended up getting nowhere. Environmental concerns about the impact of building such a terminal on mangrove swamps had by 2016 put paid to the proposed

mega-project. And the Jamaican government has since re-affirmed Great Goat and Little Goat islands as a conservation area.

At the time, prime minister Andrew Holness said a transshipment terminal in Jamaica was still under consideration, but it would not be located on the Goat Islands. "There are other locations in Jamaica that would do less environmental damage and probably be just as good strategically." Maybe this is a project that the Saudi could revisit.



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Tall ships stop off in style

Over the last few months, several Caribbean ports have enjoyed visits from some of the world's most iconic tall ships.

These elegant and graceful sailing vessels add a touch of glamor, style and history to any port.

Maybe it's also a time to reflect on whether the Caribbean as a whole or individual Caribbean nations should invest in their own sail-training ships – especially with the growing need from the shipping industry for seafarers from our region.

In the meantime, here are some examples of the recent tall ship visits to our shores:

In July, the Colombian Navy's 76-meter long, three-masted barque ARC Gloria called at Jamaica's historic Naval Dockyard in Port Royal. The ARC may appear to be from a bygone era but was in fact purpose-built in Spain in 1968 and is one of four similar vessels built for Latin

American navies – Colombia, then Ecuador, Venezuela, and Mexico.

Similarly, Brazil's magnificent Cisne Branco (or 'White Swan' in English), which called at Port Everglades in July is even newer, only dating from 2000. This is the third training ship of the same name operated by the Brazilian Navy and is also 76 meters LOA.

TALL SHIPS

Topping both ports for sheer spectacle was San Juan, which this year is celebrating the city's 500th anniversary. As part of the celebration associated with the founding of Old San Juan, four tall ships called at the port. This quartet comprised the 64-meter length, three-masted schooner Capitán Miranda of the Uruguayan Navy which originally built in 1930, the aforementioned Cisne Branco, Mexico's Cuauhtémoc (a half-sister of the ARC Gloria) and the ARC Gloria.

In addition, San Juan is the home port of the 25-meter Amazing Grace, which is part of the Maritime Leadership program, but is also available for private hire.





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Improving Caricom interconnectivity or political posturing?



Inter-island ferry services throughout the Caribbean have something of a checkered history. On the face of it, greater regional seaborne connectivity seems highly desirable and often driven by political expediency rather than what makes commercial sense.

The latest such proposal is an idea to launch a passenger-freight ferry between Guyana and Trinidad and carries with it some solid inter-governmental support. In fact, the governments of Guyana and Trinidad signed an MOU to this end in May.

But will such a ferry service ever materialize? Some in the Guyanese shipping sector don't seem to think so and see the proposal as mere political posturing. But others were much more bullish about such a prospect.

One seasoned industry figure with experience of the Guyana freight market told Caribbean Maritime: "It makes a lot of sense, what with the cost of air travel increasing. It would be especially useful if it would combine the passenger business with cars and freight containers/trucks/trailers as this would increase the frequency

of opportunity to move goods including perishables and support the increase in trade between these two Caricom states which have significant populations and growth potential. Transit time could be less than 24 hours from Port of Spain to Georgetown." (The distance between Port of Spain and Georgetown is around 400 nautical miles).

Schemes

For Guyana, the proposed ferry service is one of several major transport-related schemes that include new deepwater ports and regional logistics corridors as the newly oil-rich country plays catch-up in addressing its previously weak-ish infrastructure.

Details of the proposed ferry service, unsurprisingly, remain very sketchy but presumably will require some sort of significant state subsidy to get up and running and maybe even to operate on a day-to-day basis.

Guyana is not short of funds to back any possible ferry service which would be

aimed at encouraging Guyanese agricultural exports to be sent to heavily urbanised Trinidad & Tobago and to partly address the twin-island nation's long-term food security concerns.

There are also existing inter-regional trade barriers to overcome, which, in this case, need to be improved in Guyana's favour. Hugh Todd, Guyana's Foreign Affairs Minister, and Trinidad & Tobago's Foreign Affairs Minister Amery Browne signed an MOU to remove non-tariff barriers and investigate the fixing of several issues that could affect the Guyanese agricultural and agro-processing sectors. The agreement was also signed by Guyana President Mohamed Irfaan Ali and Trinidad & Tobago Prime Minister Dr Keith Rowley.

"We have to shift our investment patterns to bring to bear our technical expertise which we have here in Guyana, Trinidad & Tobago and elsewhere in Caricom," Dr Rowley said in May, adding "we have to insulate ourselves from the external pressures and that is what we are about".

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New board members for the ACMF

The American Caribbean Maritime Foundation (ACMF) has appointed **Elsie Rosario, Crowley's Director of Finance, and Juan Carlos Croston, CEO and Vice President Marketing & Corporate Affairs at Manzanillo International Terminal in Panama, to its Board of Trustees.**

Ms Rosario will take up the post of Treasurer, and Mr Croston, also Immediate Past President of the Caribbean Shipping Association (CSA), will bring years of experience in the maritime industry to a diverse board that includes academics and business executives. "Mr Croston has been a friend of the Foundation since its 2018, when as President of the CSA, he fostered a partnership with the group," says Genevieve Brown Metzger, ACMF

President and Executive Director. "We are delighted to have them on our team and to have their expertise and many years of experience in the leadership of the foundation."

Student funding

As the ACMF closes on its fifth year, the organization has funded over 90 students from Jamaica, The Bahamas, St Vincent and the Grenadines, Grenada, Guyana, Trinidad and Tobago and St Lucia. MATPAL Marine Institute in Guyana, is the most recent maritime training institution to join the ACMF academic partners network which

includes the Caribbean Maritime University in Jamaica, LJM Maritime Academy in The Bahamas, and The University of Trinidad and Tobago.

The foundation also launched a unique maritime jobs platform exclusively for Caribbean nationals residing in the region (see CM 46), ACMF-CAREX. Several cargo and cruise operators have already signed on to the board, along with almost 200 candidates. Under the leadership of Rick Murrell, President and CEO of Saltchuk Logistics, the ACMF launched a sea time initiative to identify internship opportunities for Caribbean cadets at sea.

“We are delighted to have them on our team and to have their expertise and many years of experience in the leadership of the foundation”



Caribbean ports in transition to face Global challenges



The Caribbean international cross-roads faces similar issues shared by North and South America. Geographic insularity, demographic limitations, cultural diversity, and political disparities should no longer be synonymous with barriers and above all with additional economic and financial costs for communities in the Caribbean basin. Moreover, those singular and complementary territories are amazing fields of experimentation

for the economy of the future that must necessarily be green and blue.

Before the Covid-19 pandemic that impacted the Greater Caribbean economies, the SEFACIL Foundation and CEIBA (Port Community System of Guadeloupe) with the support of the UMEP (Shipping Association of Guadeloupe), initiated the publication of experts' analyses about the creation of new Caribbean and Latin American economic and ecological added values.

Dinámicas portuarias en el caribe y américa latina - ports in transition to face global challenges is the seventh volume of 'Les Océanides' book collection, from the SEFACIL Foundation.

A total of 68 academics and professionals from 12 nationalities wrote 36 contributions for this volume. Dr Yann Alix, (General Delegate and Director of 'Les Océanides' book collection from the SEFACIL Foundation), Michèle Montantin (former

“

"This seventh volume puts into perspective how the LAC port areas have strengthened their fundamental role in the socio-economic development of the Americas. These contributions underline the urgent need to plan coherent regional cooperation to serve populations and territories, without ever harming the environment."

Yann Alix, General Delates of the SEFACIL Foundation

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"Many thanks to the Sefacil Foundation, Yann Alix, and the UMEP for allowing me to participate in this book. To make better known the Guadeloupe historical, maritime, and port activities to the Caribbean, to pay tribute to the work done by all those who are invested in its development, that is my goal."

Michèle Montantin, Co-director of the Guadeloupe offprint

GUADELOUPE OFFPRINT



Official presentation of the Guadeloupe offprint – May 18, 2022 – Arawak Beach Resort, Le Gosier Guadeloupe

From left to right: Louis Collomb, President of the Guadeloupe Customs Brokers Forwarding Agents – Louis-Joseph Nedan, President of the UMEP Guadeloupe – Milaika Capella Ras, General Manager of the CSA – Yann Alix, General Delegates of the SEFACIL Foundation – Michèle Montantin, Co-director of the Guadeloupe offprint.

General Director of the Guadeloupe PCS – CEI.BA and Immediate Past President of the UMEP), and José M. Pagés Sánchez, (External Strategic Advisor for AIVP – International Association of Ports and Cities) co-directed this publication.

Organization of the book

The book is structured in three parts with a special section dedicated to the logistic, port, and maritime

dimensions of Guadeloupe. Part 1 is entitled Digital, Societal and Environmental Transformations. Part 2 focuses on Economic and Logistic Competitions while Part 3 completes multidisciplinary analyses on the Strategic and Economic outlook.

It was chosen to produce a special fourth part that brings together seven special contributions of participants from within the Guadeloupe port, logistics and maritime ecosystem. This special part has been translated in English to reach an international audience.

Due to Covid-19 restrictions, the pandemic did not allow UMEP and its

partners to launch the book before 2022. On May 18, 2022, we seized the opportunity to organize the launch of the Guadeloupe offprint. This event was attended by Milaika Capella Ras (CSA), the co-directors, Dr Yann Alix and Michèle Montantin, and all contributors from Guadeloupe.

Several exceptional personalities contributed to this project, starting with the Ministers in charge of the Sea and the French Overseas Territories, Annick Girardin and Sébastien Lecornu, who prefaced the book and addressed the urgent need for a sustainable and ambitious management of maritime spaces and overseas territories.

Past President

Juan Carlos Croston, Immediate Past President of the Caribbean Shipping Association, did us the honor of signing the editorial with a message that invites: “to strengthen collaborations and partnerships in a sustainable development coherence throughout Latin America and the Caribbean.”

Jorge Duran, Secretary General of the Inter-American Ports Commission (IPC) of the Organization of American States (OAS), offers an exceptional contribution and his reflections on the digital transformation and the benefits that can be generated by the digital revolution in the management of Latin Caribbean port communities.

Jean-Pierre Chalus, President of the Board of the Guadeloupe Port Authority and President of the French Ports’ Federation (UPF), sign the fourth cover to complete the book.

“We truly believe that we will be stronger together to find the perfect balance between cooperation and competition while raising our associated and complementary services levels.”

Louis-Joseph Nedan, President of the UMEP Guadeloupe

“The ports of the Caribbean and Latin America have successfully met the challenges related to the adaptation of their infrastructures (and no doubt there will be others). Those related to energy transition and adaptation to climate change must encourage greater cooperation for the benefit of populations and their respective territories.”

Jean-Pierre Chalus, President of the Board of the Guadeloupe Port Authority

“As soon as Yann Alix and I launched the idea of this book, our ambition was to describe and synthesize the interactive experiences we face in the LAC shipping industry.”

Christophe Foucault, CEO of CEIBA



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1 DOMINICAN REPUBLIC

Work has begun to build a new US\$ 22 million seaport and cruise terminal called Samaná Bayport, located at the Samaná Bay on the north-east coast of the Dominican Republic.

Once complete in December 2023, Samaná Bayport will have the capacity to handle three cruise ships simultaneously and up to 10,000 passengers a day. A similar sized project is underway at Port Cabo Rojo, in the south-west.

The facility will comprise a SeaWalk, similar to the one installed at Port Royal in Jamaica, and two further anchorage berths.



2 PUERTO RICO

Trailer Bridge has signed a long-term lease agreement with the Jacksonville Port Authority (JAXPORT) and confirming the company's and Jacksonville's commitment to Puerto Rico.

The agreement, which takes effect at the end of 2023, is similar to the company's long-term lease agreement with the Puerto Rico Ports Authority (PRPA).

Trailer Bridge has been using JAXPORT for more than 30 years.

3 GUYANA

The Guyana Shore Base Inc (GYSBI) has signed an 11-year contract extension with ExxonMobil's Guyana affiliate, Esso Exploration & Production Guyana (EEPGL).

GYSBI's new contract will run up to 2033, building on the existing deal that was awarded back in 2017.

GYSBI has directly invested some US\$ 300 million in port infrastructure and real estate development, warehousing and support services.

GYSBI started out with just eight acres, two berths and one warehouse but at present, it boasts 170 acres, eight warehouses and four berths, with further expansions planned.

4 JAMAICA

In mid-October Kingston Freeport Terminal took delivery of 15 Polish-built straddle carriers from Kalmar Global – an order thought to be valued at more than US\$ 20 million.

The new equipment is expected to be fully deployed in November. The straddle carriers add further to Jamaica's bold ambitions to be a leading Caribbean logistics hub (see separate story this issue).

Fifteen of the 19 straddle carriers arrived in Jamaica from the Polish port of Gdynia on board the Spliethoff vessel Stadiongracht. Meanwhile, Maritime & Transport Services acted as agent in Kingston for the Dutch-flagged vessel. The balance of the order is being shipped by CMA CGM in knocked-down form.

CM would like to thank Trevor Riley, Group CEO of the Jamaica Shipping Association for use of the image below. ©Trevor Riley



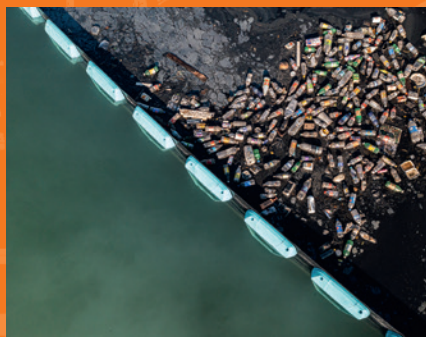
Kingston Freeport Terminal

5 JAMAICA

Three Interceptor Barriers installed by The Ocean Cleanup are now deployed and operational in Kingston at the mouths of Rae Town, Kingston Pen and Barnes gullies. In the first four months of operation, 5,800 kg of waste was collected. Of this, 2,100 kg was plastic: the majority being half-liter PET water bottles. This measure provides a baseline for operations launched at the tail-end of a dry season.

Built in 1942, Jamaica's concrete drainage system initially included seven branches that discharged into either Kingston Harbour or Hunt's Bay. By 1962, the number had grown dramatically. Today, the network extends far inland to the hills of St. Andrews. The purpose of each pathway is to drain July to October seasonal downpours. Gullies have become dumping grounds for neighborhoods that lack proper

and routine garbage collection. Blockages cause localized flooding, plus damage to roads and homes. Around 80 percent of the solid waste emitted from gullies is plastic. On an annual basis, The Ocean Cleanup estimates that 947,000 kg of plastic travels down these gullies, eventually discharging into adjacent open water. Images courtesy of 'The Ocean Cleanup'.



6 FLORIDA

Transportation Infrastructure Partners, a joint venture between Ridgewood Infrastructure, and Savage, has announced the acquisition of Worldwide Terminals Fernandina, LLC (Fernandina), the manager and operator of the Port of Fernandina.

The Port of Fernandina, northeast of Jacksonville is an intermodal terminal handling bulk, breakbulk, and containerized cargo. The port provides mission-critical transport, logistics management and product handling services to a wide customer base.

Ridgewood Infrastructure, a leading US-based infrastructure investor and Utah-headquartered Savage, a global transportation and materials handling company, established Transportation Infrastructure Partners to jointly acquire and operate essential transportation and logistics infrastructure throughout the US.

7 DOMINICAN REPUBLIC

Río Haina is getting an upgrade. In addition to two soon-to-be-installed gantry cranes, the port authority is making other investments such as the addition of a heavy-duty mobile crane with a 154-ton capacity. These upgrades mean faster cargo throughput and less congestion.

8 COLOMBIA

The Port of Barranquilla has strengthened its bulk installed capacity with the inauguration of a new warehouse, which has a static capacity of 35,000 tons and represents an investment of USD 4.8 million.

9 COLOMBIA

Ellicott Dredges of Baltimore, Maryland, recently delivered a new dredger to Cormagdalena, a Barranquilla-based marine projects and river management company.

The vessel has a maximum digging depth of 15 metres and will be used to remove sediment from the 1,500-kilometre-long Magdalena River over the coming months. Two older Ellicott-built dredgers are also working on the project.

The Magdalena River is the most important and largest river in Colombia, and it is easy to understand why it is crucial for navigation and for economic and environmental purposes. There is an on-going dredging project in the river where the purpose is to ensure navigability from Colombia's main inland commercial hubs to the Caribbean Sea. This project will cut transportation costs and boost the Colombian economy in terms of productivity, trade and tourism.

Currently, Ellicott has supplied a total of three dredgers for "El

Brazo de Mompox" a part of the Magdalena River that has been particularly impacted over the years by deforestation, erosion of its slopes, excessive sedimentation and flooding. The Ellicott 1270 Dredge pictured is the most recent dredge shipped to this region which is a powerful and robust dredger equipped with digging depth capability with an 800 HP main engine and a 375 HP auxiliary engine, a total of 1175 HP. The dredge is ideal for the conditions and demands of this project. Ellicott's proven quality, reliability and strong presence in Colombia are critical for this very important project.



Marisabel

10 BELIZE

The IMO-Norway GreenVoyage2050 team is supporting the government of Belize to set up a National Action Plan (NAP) to address GHG emissions from shipping and also draft legislation to enshrine MARPOL Annex VI into national regulation.

As part of the capacity building support, the GreenVoyage2050 team will assist the country in identifying and addressing data gaps (such as emissions from ports and domestic shipping). This information will underpin the formation of national strategies to tackle these emissions.

Belize, which is a GreenVoyage2050 partnering country, identified these

data gaps during a virtual national roundtable that explored the drivers and benefits of creating a NAP for Belize. Fifteen participants across government agencies and national ports attended the session, which confirmed the need for a NAP as part of the sustainability component of Belize's wider maritime policy. Attendees are expected to continue the roundtable discussion in the coming months.

Countries participating in Phase I of the GreenVoyage2050 project comprise Azerbaijan, Belize, China, Cook Islands, Ecuador, Georgia, India, Kenya, Malaysia, Solomon Islands, South Africa and Sri Lanka.

11 GUYANA

KOTUG Guyana Inc (a wholly owned local subsidiary of Rotterdam-based KOTUG International) has been awarded a second contract by Esso Exploration & Production Guyana (EEPGL) to

support operations in Guyana. KOTUG's SD Honour will join the fleet of dedicated offshore terminal tugs supporting the two Floating Production, Storage and Offloading units (FPSOs)



12 SURINAME

The Regional Meeting for Directors and Heads of Maritime Administrations (formerly known as the Workshop of Senior Maritime Administrators), jointly organized by the International Maritime Organization (IMO) and the Maritime Authority of Suriname (MAS), was held in Paramaribo in July.

The meeting was considered an important transition to a more formalized structure to address matters affecting sustainable maritime transport in the Caribbean Sea. This would include: transport of cargoes and passengers by sea, facilitation of maritime transport, legal and legislation matters, marine technology, maritime education and training, maritime safety, protection

of the marine environment, navigation and rescue and any other relevant matters.

Important decisions of the meeting included the provision of additional support for the development of the regional casualty incident/investigation database, progressing the GloLitter Program in the region, increased collaboration among Caribbean maritime training institutions and increased support for the gender-based data collection by the Women in Maritime Association Caribbean (WiMAC).

IMO was requested to reconvene a High-Level Symposium of Ministers responsible for maritime transport to focus on legislative issues and climate adaptability matters.

13 CURAÇAO

Fresh investment in Damen Shiprepair Curaçao, the largest shipyard in the Caribbean, is expected shortly. The shipyard has since 2017 been leased to Dutch specialist shipbuilder and repairer Damen. The shipyard recently undertook the first project, which was an investment of approximately US\$ 1.1 million for the overhaul of the gate on one of the yard's four drydocks. In anticipation of the approval for a broader investment program, Damen undertook the work on Dock B.

Peter Luiten, general manager of Damen Shiprepair Curaçao, told the Curaçao Chronicle that "this important investment should be the go-ahead for a large-scale renovation program for the yard. The decision on the investment program for the yard will be made in a few weeks."

Plans call for an investment valued at around US \$36 million. After Damen took over the management of the yard, the company upgraded the facilities with two additional floating drydocks. The larger of the two measures 230 meters in length. The smaller floating dock is 100 meters in length.

The yard also has two graving docks the larger of which can accommodate vessels up to 279 meters in length and a capacity of 150,000 tons. The second graving dock has a capacity for vessels up to approximately 170 meters in length and 28,000 tons. The yard also offers three mooring and repair quays with a total length of nearly 915 meters.



14 PANAMA



SAAM Towage will receive a new 70-ton bollard pull tug for its fleet in Panama. The SAAM Quibian has been ordered from Turkey's Sanmar Shipyards.

SAAM Towage's Technical Manager Pablo Cáceres explained that "this tug's equipment has been specially selected to reinforce our customers' needs in Panama, while its compact design ensures safe maneuvers".

SAAM Quibian, the third to join the Panamanian fleet, owes its name to the legend of a brave chief from the Caribbean coastal province of Veraguas during Christopher Columbus' fourth voyage.

Designed by Canadian naval architects Robert Allan, it is a 'sister ship' of the SAAM Palenque and SAAM Valparaíso, which also operate in Panama.

15 TRINIDAD & TOBAGO

The Couva-based National Energy Corporation of Trinidad and Tobago is set to take delivery of a new 60-ton bollard-pull tug is early 2023.

The National Energy Resilience, as the new tug will be named, is a Damen Azimuth Stern Drive (ASD) 2811 tug design. This design is the successor of the very popular ASD 2810 design that has been approved to current safety and environmental standards.

The main option chosen by NEC is the inclusion of an exhaust after-treatment system, to make the vessel comply with IMO Tier III. Currently, IMO rules & regulations are not yet applicable for the local region, but NEC has decided to be ahead of the rules and select the

green option anyway. This is actually the highest level of emission reduction certification currently available for this type of vessel and would represent a first for the Caribbean.

NEC wants to set an example and the new standard for the region by operating the new tug as cleanly as possible. The fully in-house designed and developed SCR system cleans the engines exhaust gasses from particulate matter and nitrogen oxide gasses, reducing emissions of the latter by around 80%.

NEC's Head of Vessel Operations, Kevin Phillip, told CM that the new tug would be used for barge operation and oil rig tows as well as day-to-day harbour work. The tug will be based at Point Lisas.

16 FLORIDA

Port Tampa Bay will receive US\$ 12.6 million in grant funding from the US Department of Transportation to expand and diversify a berth at fast-growing Port Redwing. The port's funding allocation is part of US\$ 1.5 billion in grant funding made available through the Rebuilding American Infrastructure with Sustainability and Equity (RAISE) discretionary grant program.

Port Tampa Bay will use RAISE funding to create Berth 301 at its satellite facility, Port Redwing. The new berth will provide room for a third large ship to be worked efficiently.

Port Redwing is located at Gibsonton and was purchased by Port Tampa Bay in 2012. The port covers 110 acres and is 17 km by road from Tampa.

In the past 12 months, the over one million tons of cargo was at Port Redwing – including cement, prilled sulfur, aggregates, steel, food and agriculture, wallboard and construction, and project cargo.

17 JAMAICA

THE PORT Authority of Jamaica (PAJ) is set to expand berthing capacity at Port Antonio, on the northeast coast. The expansion will include improvements to the port's Errol Flynn marina.



Errol Flynn Marina, Port Antonio

18 TROPICAL SHIPPING

Kalmar, part of Cargotec, has concluded an agreement to supply Tropical Shipping with three new diesel-electric straddle carriers. The order was booked in Cargotec's 2022 Q3 order intake, and the delivery of all units is scheduled to be completed in Q3 2023.

From Canada to South Florida, Puerto Rico and the US Virgin Islands, Tropical Shipping operates state-of-the-art facilities in selected ports to meet the customers' freight needs to and from the Caribbean and The Bahamas. Tropical Shipping

operates a large fleet of Kalmar equipment including straddle carriers, reachstackers and terminal tractors.

The Kalmar Straddle Carrier is powered by a diesel-electric driveline and offers high performance, excellent fuel efficiency and low noise as well as complying with the latest exhaust emission regulations.

One of the new straddle carriers will be a special width unit specifically dedicated to rail operations.

20 DOMINICAN REPUBLIC

Svitzer has added the Svitzer Rivas to its fleet of tugboats in the Dominican Republic. The 80-tonne bollard pull Ramparts 2400SX Z-drive tug was built by Sanmar Shipyards in Turkey. This is the 27th tugboat that Sanmar has delivered to the world's largest tug operator.

19 DOMINICAN REPUBLIC

The Dominican Port Authority (Apordom) and the General Directorate of Public-Private Partnerships (DGAPP) has announced the start of the bidding process for the modernization of Puerto Duarte/Arroyo Barril, on the north shore of Samaná Bay.

The port currently comprises a narrow single pier and in the past was used for regional pineapple exports. But in line with some other Dominican ports will now be transformed into a new cruise terminal and a supporting destination.

Additionally, there will be an estimated investment of US\$ 60 million aimed at rebuilding and building facilities to accommodate cruise ships with capacity of up to 8,500 passengers at a four-berth terminal.

Up until now Dominican Republic cruise ports, with the exception of Caleta Ámbar, have lacked the necessary capacity to receive Oasis-class ships.

21 ST MAARTEN

Port St. Maarten Group (PSG) management announced in September that its High-Level Plan 2031 had been approved by the Council of Ministers (COM).

PSG Chief Executive Officer (CEO) Alexander Gumbs (see CM 45) explained: "The High-Level Plan 2031 will shape the future of PSG where it concerns restructuring and repositioning our business model and financial capabilities therefore making us a more resilient port."

"The high-level plan is instrumental in streamlining PSG objectives in line with the company's core business over the medium-to-long term in directing the future development of our port. We seek to improve our competitive footing and make the needed investments in the coming three to five years in collaboration with international stakeholders."

"We are well underway through discussions with the cruise industry as we renegotiate the current contracts to meet PSGs current needs as we prepare for the future collectively. The strategic objectives also speak towards working closer with local



Alexander Gumbs

stakeholders such as the Sint Maarten Tourism Bureau (STB) and Princess Juliana International Airport (PJIA).

"The objective is to further grow the homeporting niche, collective destination marketing, promotion introduction and facilitating growth of local products/services of entrepreneurs to the cruise industry."

"We also set out to achieve sustainable goals by reducing our carbon footprint, further strengthening the environment, social and governance elements as we shape the future of PSG."

The Port also continues to strengthen and improve on compliance, corporate governance and risk management practices."

Is the party coming to an end?

JULY 2020 / Shutterstock.com

Container Market

The global container market further developed positively from May until July. As of August, however, the combination of stagnating TEU volumes and easing congestion issues took some of the steam out of the charter market. Consequently, the unravelling of the multiplier effects caused charter rates and periods to recede. Easing congestion, lower freight rates leading to less extra loaders, shorter drydock yard stays were all factors that freed up vessel capacity.

The worldwide congestion issue eased during the last couple of months and had become more of a regional problem by the end of August. Despite the Covid-19 induced lockdowns in China, port congestion and vessel waiting times in Asia had been very manageable with on average around or even below one day waiting for 15 major ports in the Far East and Southeast Asia. At barely any port did ships have to wait for more than two days during the last four months.

In Northern Europe and North America

congestion continued to be a persistent problem. A general lack of port workers, port worker strikes, full terminals due to insufficient container outflow as truck drivers were missing or in the case of Rotterdam very low water levels on the Rhine preventing on-transport via barges, all were reasons for the long waiting times. In the US for example: Houston, Los Angeles, Newark, Oakland and Savannah all provided delays of more than one week, some even up to three weeks by the middle of August. During June even more than 30 ships had been waiting at Savannah.

One indicator also pointing towards lessening congestion is schedule reliability which has globally been improving since April, but at a global average of about 40% still stands at dismal levels in absolute terms.

As a result of the declining capacity bound by waiting, the container freight rates on the trans-Pacific trade lane had been on constant decline during the last four months. On the Asia to USWC route for example spot rates for 40ft containers

more than halved from over US\$ 10,000 in May to under US\$ 5,000 by the end of August. In the Atlantic on the other hand the efficiency problems caused rates to stay high at over US\$ 8,000 for the North Europe to USEC route. The lower freight rates in turn reduce the possibilities to profitably employ small extra loader tonnage between 1,000 and 3,000 TEU and more ships were once again available for intra-regional trade. In the Transatlantic trade lane, there were still about a handful of 1,300 to 1,400 TEU extra loaders employed by August, which could be released should the congestion situation improve.

Apart from the extra loaders provided by the traditional carriers there also remains the question how financially stable the newly established operators will be in a lower freight rate environment. By August there were for example three European operators, all formed during the last two years, that chartered a combined 12 container and five MPP vessels between 700 and 3,000 TEU for direct Asia to Europe connections.

The situation in Russia is still constantly changing but the effect on the international charter market had settled by August. In the Baltic and the Black Sea only one global operator keeps calling Russian ports plus a few ad-hoc calls from the third-party feeder operators and some Eastern Med-based carriers continue sailing to Novorossiysk. Between May and August, the average number of weekly container vessel calls to Novorossiysk shrank from 10 to 7.5 and in St. Petersburg the drop was even more pronounced with a reduction from eight to below four. In January the average number of calls for Novorossiysk had stood at 17 and at 22 for St. Petersburg.

Next to the established players several new operators, often with Russian background, have taken on very small container vessels or container-capable MPP ships to cater to the increased cargo demand on the Russia – Turkey and Russia – India trades. The effect on the overall container market however is negligible as barely any of the newly employed vessels had previously been on charter to international carriers.

The freed-up vessel capacity, due to the service reduction by the main operators, though, did affect the charter market and was one of the reasons for the large discrepancy between Atlantic and Pacific charter rates for small container vessels. 700 TEU ships for example oftentimes fixed over 50% higher rates for intra-Asian trade compared to Mediterranean trade during July and August.

Due to all the aspects reducing tonnage demand from charterers, relet ships had started to appear as from July onwards, both in Europe and in Asia and some carriers did “voluntarily” redeliver ships were previously tonnage only left when somebody else had offered better terms. By the end of August, for the first time in almost two years, owners also had to position their ships on their own account to deliver into a new charter.

In Colombia, close to the existing port of Turbo, a new container a new container terminal (see CM 46) is being planned

with a possible completion by 2025. Turbo currently is a port mainly catering to reefer exports and is being serviced by geared vessels of up to 3,800 TEU only. The port development is backed by top liner operator.

Another aspect related to reefers was that as of May one fruit producer and reefer carrier opened services to the general market which previously only catered to his own cargo. The advantage of those services from the US to Central America is that they provide a fast transit time and generally very high reliability.

In the sub 1,000 TEU category, container vessel chartering for Americas services

was basically non-existent during the last couple of months. Carriers did make use of MPP vessels of about 12,000 dwt and 700 TEU to fill gaps left by missing small cellular ships. When looking at the charter hire, rates of over US\$ 20,000 were achievable and as such even higher than for pure container ships but only for three-to-six-month periods. On the other side of the Atlantic 700 TEU ships for example fixed US\$ 16,000 to US\$ 20,000 and usually for durations of six to 12 months. One Caribbean service which had been run with just two MPP vessels for a couple of months however was scheduled to return to one MPP plus one 1,100 TEU container

“ Another aspect related to reefers was that as of May one fruit producer and reefer carrier opened services to the general market which previously only catered to his own cargo. The advantage of those services from the US to Central America is that they provide a fast transit time and generally very high reliability”



vessels by September as the operator can free up the container vessel by reorganizing his services.

One reefer cargo owner had been looking to charter in a small, geared vessel under 1,000 TEU to open up his own service but had been unsuccessful to find suitable tonnage during July and August.

The market for 1,100 TEU ships in the Caribbean was completely empty but operators did secure tonnage from Europe or Asia for their projects in the Americas. In May a global player brought a 1,100 TEU ship from the Mediterranean for a new US Gulf-Central America, reefer-heavy, service. A US-based carrier had to charter a gearless, ice-classed ship from Europe with delivery and redelivery in Northern Europe to fill its service. With a period of over two years and a rate in the high USD 20,000s the terms were also substantially better than the low USD 20,000s fixed for a sister with just intra-European trade. In mid-June another liner fixed a standard 1,100 TEU geared ship in the Med for less than one year at mid USD 30,000s and positioned it to the Caribbean. A third-party feeder operator rather chose to purchase a fuel-efficient, but gearless 1000 TEU ship in Asia and brought it over the Pacific for intra-Americas trade. By the middle of August charter rates for periods between six and 12 months had come down to high USD 20,000s for ships operating in the Mediterranean.

The 1,300 to 1,800 TEU size range showed nicely that with the dearth of tonnage, carriers moved ships to the most profitable areas. A 1,300 TEU high-reefer vessel and a 1,700 TEU ship were repositioned from the WCSA to the Far East where they were employed on China-Russia trade which provided higher container freight rates than the South American routes. One, liner owned, very sophisticated ice-class, 1,600 TEU vessel which had become surplus due to the sanctions against Russia first sailed from North Europe to China, from there onwards with high-paying spot cargo to Canada and by early June ended up in an intra-Americas service.

CONTEX

	CONTEX	12 MONTHS, 1100	12 MONTHS, 1700	12 MONTHS, 2500
May-22	3129	31242	53372	7061
Jun-22	3269	33368	56464	74641
Jul-22	3283	34844	56331	75261
Aug-22	3087	32239	51659	71064

In order to convince the owner to agree to the unfavored Venezuela trade one charterer had to go for three years at about last done rates of high USD 20,000s. In comparison, a very high specification 1,800 TEU ship “only” got one, to one and a half years for pure reefer trade between the US and Central America.

As with the smaller segments two operators made use of a 30,000dwt 1,800 TEU MPP vessel with partially celled holds to fill short term gaps.

Market activity for 2,500 TEU ships in the last four months in the Atlantic was minimal. A high-reefer 2,800 TEU ship was fixed away from ECSA to NCSA trade for three years at almost US\$ 50,000 in June. As of September, the vessel is scheduled to sail between North Europe and the Far East. A package deal of four modern, geared, 2,600 TEU ships, also concluded in June will see one of the vessels move to Caribbean/WCSA trade. In Asia 2,500/2,700 TEU geared ships were able to fix one-year periods for between US\$ 70,000 and US\$ 90,000; the exact rate depending on the vessels’ specs and delivery dates, throughout June, July, and August. Apart from the above-mentioned package deal multi year charters had become very scarce though, with for example one gearless 2,700 TEU ship fixing three years at about US\$ 40,000 in July.

Macroeconomics

Apart from the shipping and terminal-related problems the dark clouds on the global economy are also putting pressure on the container shipping markets as TEU volumes are no longer growing as fast as during the last two years.

On the back of trade disruptions due to the war in the Ukraine and the consequent much higher food and energy costs the economic forecasts have been down-graded since the beginning of the year. The IMF for example only expects 2.3% GDP growth for the US in 2022 and even less with just 1.0% in 2023. ECLAC sees 2.5% for Central America, 2.6% for South America and 4.7% for the Caribbean in 2022, whereas the Caribbean is the only region that is likely to post higher figures than last year.

World trade is forecasted to amount to 4.1% growth in 2022 and only 3.2% in 2023. The numbers for emerging markets are even less with just 3.2% and 3.3%.

For global container shipping a large orderbook in combination with low TEU throughput grow caused by slow economic growth will likely cause further downward corrections for container freight and vessel charter rates for the rest of 2022 and in 2023. In 2021 TEU throughput growth was 2.2 percentage points higher than fleet capacity growth, but this situation is forecasted to turn this year with 3.4 percentage points larger capacity increases. In 2023 those figures are likely to increase with a capacity to demand growth imbalance of 5.5 percentage points.

The negative effect on the Caribbean could be somewhat delayed as among the 170 vessels up to 3,000 TEU which are scheduled to hit the water in 2023 barely anything is specifically built for Americas trade but the displacement of older tonnage from Asia to the Mediterranean and the Americas will surely continue.

A counterbalancing effect on physical fleet growth will occur as of 2023 due

to the EEXI and CII regulations which will come into force. EEXI for some vessels limits the maximum allowed speed and does pose an issue to some operators who are purely focused on reefer trades. CII which looks at CO² emitted per mile sailed will also have the largest effect on routes where speed is essential. A 900 TEU vessel trading between the US and Central America at 16 knots and more, will likely only be compliant for one or two more years, before the speed will have to be reduced and more tonnage taken on to fill the transport demand. 1,100 TEU vessels trading between the Caribbean and NCSA, which today already only sail at 12 to 14 knots are looking fine for a few more years.

Sale and Purchase of Container Tonnage in the Caribbean

Not just individual vessels were sold during the summer, but a large Caribbean feeder operator was sold to an investment fund which also controls the number two global third-party feeder operator.

Overall, the prices for vessels followed the charter market curve and asset prices were somewhat stable during May and June before receding in July and August as long-term periods were ever harder to come by. As the charter periods became shorter the buying interest from carriers also lessened and some tramp owners and financial investors once again got the chance to buy some ships. By August more and more container ships came up for sale and especially older tonnage where owners want to cash in before the market truly drops.

Apart from some of the major liners buying standard 1,100 TEU and 1,700 TEU tonnage which could well be employed in Americas related trades, an eco 1,000 TEU ship was also purchased by a feeder operator for Caribs trade and another carrier acquired three, very rare, high-reefer, ice-classed 2,500 TEU ships. On the investor side a 1,300 TEU vessel was bought by German interests against a three-year

SELECTED CONTAINER FIXTURES

1100 TEU - GEARED, CELLED

May 22	Warnow Beluga	3 years	US\$ 28000.	p/d
	1300 TEU / 975@14 / 19on43 / 390rp, geared			
May 22	Marfret Marajo	11-13 months	US\$ 46000.	p/d
	1691 TEU / 1149@14 / 19on55 / 418rp			
Jun 22	JSP Bora	8-9 months	US\$ 36000.	p/d
	1118 TEU / 700@14 / 19on40 / 220rp, geared			
Aug 22	San Amerigo	12-19 months	US\$ p&c	p/d
	841 TEU / 1293@14 / 21on71 / 462rp			



charter to a Cuban charterer at a sky-high rate. And the Greek owner with the largest fleet of CV1,100 types snapped up another one of those ships which already traded in the Caribbean area. Lastly, another old 700 TEU geared ship left the Americas for dry docking and was subsequently sold to Turkish interests rather than returning across the Atlantic.

Newbuilding prices are expected to stay firm despite a weakening charter market. But the yards' order books are full and the shipbuilders are under no pressure to

acquire fresh business. Additionally, labor costs have risen, and raw materials have also become more pricey. In many cases yards even fail to earn any money despite the booming container market as costs have just risen faster than expected. This situation is illustrated by a combined loss of the Korean shipbuilding industry in 2021 of USD 1.3 billion.

Possible delivery dates for most vessel orders are nowadays well into 2025 and oftentimes the engine readiness is the limiting factor.



When Jamaica took on the shipping world – and won

As part of an occasional series looking back at the Caribbean's recent maritime history this is the story of how in the 1930s Jamaican business took on the world's leading reefer and passenger ship interests – and won.

As a major banana exporter, Jamaica was historically reliant on overseas-owned shipping to transport its top foreign exchange earner to key markets in Europe (principally the UK where by 1932 there was a guaranteed preferential market) and North America.

The Jamaica Banana Producers' Association (JBPA), an independent co-operative, aimed to redress this over reliance and in 1929 boldly decided on behalf of its over 6,000 members to form its own shipping company. Led by a few wealthy landowners with at least some expertise in finance, law and shipping they formed

the Jamaica Banana Producers Steamship Co (JBPSC) which would operate under the name of the Jamaica Direct Fruit Line.

In addition to bananas, and like its already well-established competitors, JBPSC sought to transport both passengers and inbound general cargo.

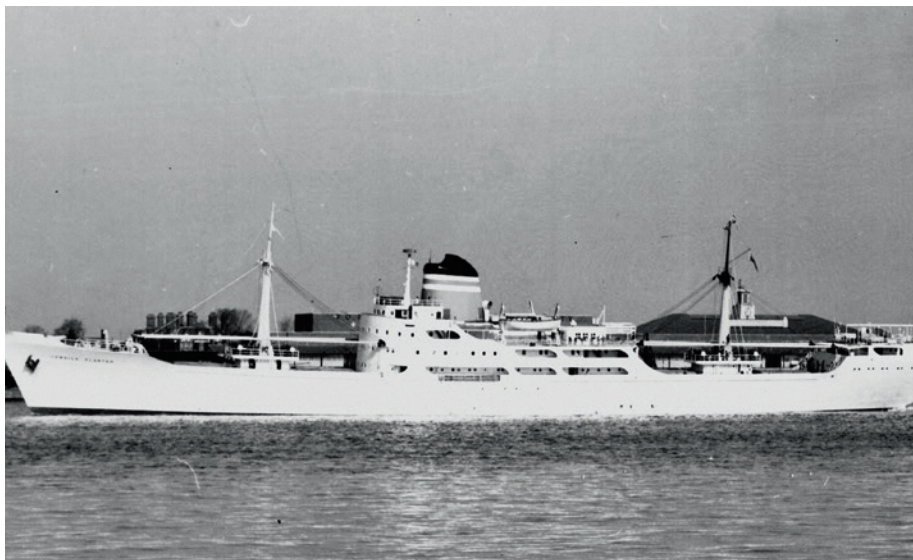
To launch its venture, JBPSC bought four aging second-hand reefer vessels, and renamed the quartet Jamaica Planter, Jamaica Producer, Jamaica Merchant, and Jamaica Settler and immediately became Jamaica's first wholly owned shipping company.

But as we all know to this day, the shipping business can be tough – especially for untested newcomers and outsiders. So, it was no surprise that despite the heavy investment and the enthusiasm of many, the fledgling Jamaican company struggled during the early years of its existence.

Eventually and to stem ongoing losses, JBPSC reluctantly came to agreement with the then all-powerful United Fruit Company (a brand that would eventually morph into Chiquita) with its near monopoly of certain aspects of the banana shipment business whereby the two companies opt to become "friendly" competitors. At the same time, JBPSC chose to become a joint stock company with its shares initially allocated based on the original holdings in the co-operative.

Downturn

After a downturn caused by the Great Depression and by the late 1930s, banana sales were booming again and represented by value around 50% of Jamaica's total exports. As a result of the buoyant market, four newer vessels were purchased by JBPSC: a second Jamaica Producer, a



“ It took until 1959 before JBPSC was confident enough to order its first new vessel (a third Jamaica Planter) from the Lithgows shipyard in Glasgow, Scotland

freight forwarder RAM Shipping and became a fully integrated logistics business.

The following year after a series of devastating hurricanes and fierce competition from Latin American producers, banana exports to the UK dried up. Today, Jamaican banana growers mainly supply their domestic market and export only a very small percentage of their crop each year.

Involvement

The involvement of Jamaica Producers in shipping continues and in 2021 the company acquired a 50% shareholding in Geest Line – the leading shipping line connecting Europe to the Caribbean with Curaçao-headquartered reefer specialist Seatrade holding the balance.

More recently (and it's certainly not the final piece in the jigsaw) Jamaica Producers has bought Miami Freight & Shipping Services (see CM 46). This addition to the Group's shipping and logistics portfolio marks an important expansion and creates a diversified logistics and shipping platform that links the world's major markets to the Caribbean.



second Jamaica Planter, as well as the Jamaica Pioneer and the Jamaica Progress.

Unfortunately, the boom was short-lived. The outbreak of war in Europe had a devastating impact on Jamaican banana exports to its main UK market, which ceased abruptly. What's more, JBPSC's ships were requisitioned for war service by the colonial British government; using their much-needed reefer capability to deliver food. Sadly, but hardly surprisingly, not all JBPSC vessels survived the conflict.

During this very difficult time, the All-Island Banana Growers' Association (AIBGA) was formed. After World War II, it was the AIBGA, along with Liverpool-based reefer operator Elder's & Fyffes, that would negotiate with the British government to agree a new landed price for bananas in the UK.

Flourish

Nevertheless, it was a long road back for both Jamaican growers and for Jamaican shipping. In fact, it would not be until the late 1950s that the country's banana business would once again flourish.

It took until 1959 before JBPSC was confident enough to order its first new vessel (a third Jamaica Planter) from the Lithgows shipyard in Glasgow, Scotland and end a long reliance on chartered-in tonnage. Three years later, the company was able to place another newbuild order (also from Lithgows). This fine-looking and

third Jamaica Producer would see service for a further 18 years before the ship was sold and ignominiously converted into a livestock carrier by its new owners.

Thanks in part to these new ships, Jamaica was between 1960-1971 exporting, on average, around 150,000 tonnes of bananas to the UK annually.

During the 1970s there was a slow decline in banana exports. In 1978 the last JBPSC-owned ship was withdrawn from service as the banana business was nationalized by Michael Manley's Jamaica Labour Party (JLP) government. A new state-controlled company, Jamaica Merchant Marine, took over banana shipping, although the JBPA retained a share in the firm.

The drop-off in banana growing was eventually turned around and confidence in the trade restored. At the same time, logistical and transport improvements in the company's main UK export market spurred the building of a new dedicated terminal in Newport (Wales) by Associated British Ports to exclusively handle Jamaican fruit imports.

By 1988 the Jamaican government was starting to ease back from its direct involvement in sea transport and Jamaica Producers Shipping was formed in association with leading local finance-to-food firm Grace, Kennedy & Co. This company would eventually become privately owned.

In 2007, Jamaica Producers bought



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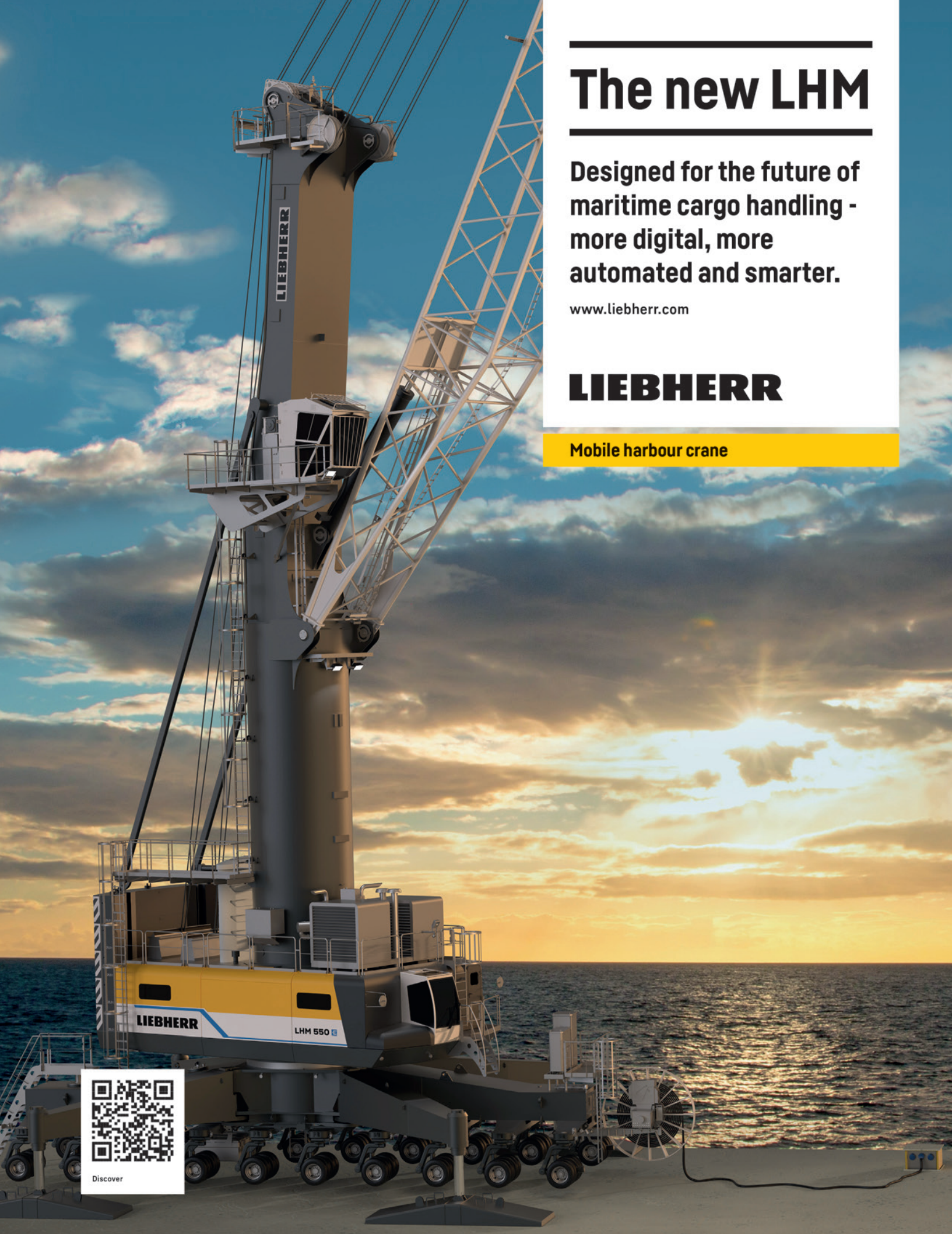
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A large Liebherr LHM 550 mobile harbour crane is the central focus of the image. It is a tall, grey structure with a yellow and white base, mounted on a multi-wheeled mobile platform. The crane's boom is extended upwards and to the right. The background shows a sunset over the ocean with a golden sky and dark clouds. The crane has 'LIEBHERR' written vertically on its mast and 'LHM 550' on its base.

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