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Predicted growth for the Caribbean and Central American markets

As one of the premier meeting grounds for the Caribbean maritime sector, the CSA's 45th Annual General Meeting, Conference & Exhibition in Cartagena, Colombia on 19, 20 and 21 October is well positioned to provide a fertile environment for the discussion and analysis of topics of critical interest to the sector and our membership.

This event is unfolding against the backdrop of the final moments of the US\$ 5.2 billion construction project to widen the Panama Canal which, minor construction setbacks notwithstanding, is powering ahead toward completion. From April 2016 containerhips of up to 13,000 teu will be able to navigate the canal, which more than doubles its current 5,000 teu limit.

Broadening the international shipping lane to bigger vessels is predicted to drive significant change in international and regional maritime trade dynamics. This is compounded by the increase in vessel size driven by rapid advances in engine technologies and hull design combined with new alliances among shipping lines. The 16 largest shipping lines have formed themselves into four major consortia, collectively controlling over 95 per cent of the cargo volumes moving in the major east-west trades.

The improved economies of the larger ships now make it possible to route cargo

via the Suez Canal into the Atlantic Ocean and on to the Caribbean or directly to US East Coast terminals. This presents an opportunity for our regional ports as shippers realign the trade routes between the major production and consumption centers of the globe. In fact, medium-term container market forecasts indicate that the Caribbean and Central American markets are expected to experience a 7.7 per cent annual growth to 2017 compared with 6.5 per cent in global container volumes.

POTENTIAL

With the potential increase in the flow of goods through these regional hubs on their way to the major markets of the US Eastern Seaboard, there is potential for other logistics-related services like warehousing and distribution also migrating to these hubs, allowing them to develop into fully fledged

logistics clusters.

While there exists great opportunity for growth in Caribbean logistics, there are important challenges as well for region's major hub ports, which continue to strive to meet the attendant and projected demands. According to assessments by the World Bank, there are factors yet to be resolved including the quality of the trade and transport infrastructure, the efficiency of the customs processes, the ease of arranging competitively priced shipments, the quality of logistics services, the ability to track and trace consignments and the frequency with which shipments reach consignees on time.

Implementation of the World Trade Organization's Trade Facilitation Agreement is a critical factor that requires our collective attention and combined leverage. We must serve as lobbyists, guides and sounding boards for our governmental policy-makers. Trade facilitation, non-tariff measures and services are key elements for trade development and there is an urgent need to focus on enhancing national, regional and international policy and infrastructure in order to promote sustainable growth and global competitiveness.

How will infrastructure developments and the emergence of new destinations, combined with the need for fuel efficiency, reshape the Caribbean? What is required of Caribbean ports if we are to capitalize on the advent of Oasis-class and mega

While there exists great opportunity for growth in Caribbean Logistics, there are important challenges as well for the major hub ports of the region which continue to strive to meet the attendant and projected demands



cruise vessels? How might the opening of Cuba, dubbed by some 'the unpredictable variable', impact regional development? Cruise lines are already exploring possible itinerary options for ports in Cuba in order to add destinations for cruises of various lengths that begin and end in Florida or at one of the many island nations near Cuba. That development is conditioned by political developments but also by the fact that many of these ports require infrastructural changes in order to accommodate these mega vessels.

ADAPTING

Which areas will emerge in the cruise charts of the future and which will decline? How is the region adapting to the increase in international source markets? What is being done and what needs to happen to create demand in the face of rising international competition? These are matters demanding our debate as an industry.

We must also examine how LNG bunkering capacity is being developed around the world. Carnival Corp. is the latest to show its belief in LNG bunkering by signing a multi-billion-dollar contract to build four 'next generation' LNG-powered cruise ships with the largest guest capacity in the world. On the infrastructure side, South Korea has just announced its plan to construct LNG bunkering terminals at a number of its ports. Here in the region, AES Dominicana is launching LNG transshipment and LNG bunkering services for the Caribbean, Central and South America, leveraging the company's LNG receiving and storage terminal and fuel-handling capability in the Dominican Republic. As a clean energy, natural gas is being increasingly valued as a reasonable option to resolve emissions for shipowners in coming years forced by new rules and policies from IMO and government bodies.

Increased cruise and commercial shipping in the Caribbean Sea have heightened



Francisco Ramos Gallego / Shutterstock

the risk of intentional and accidental pollution according to Christopher Corbin, an official at the United Nations Environment Program (UNEP). Corbin said that, although data from his organization's Caribbean environment program suggested that 70 per cent of the pollution of the marine environment comes from land-based sources, there was still a need to ensure that pollution from ships was minimized, as it had the potential to affect the region's fragile coastal and marine ecosystems. Now, more than ever, we must recognize that the protection of the Caribbean Sea is not just about environmental conservation and marine protection but also makes good business sense.

VIABILITY

The viability of shipping can only be guaranteed by having in place highly trained, skilled and knowledgeable seafarers and land-based maritime professionals to efficiently and safely operate ships and ports of the world. We at the CSA continue to demonstrate our commitment to industry-related training by offering courses at little or no cost to ensure capacity building among skilled employees across the region. Our offerings have been eagerly anticipated and well supported, which demonstrates the demand in this area and the training gaps

we seek to fill.

The CSA's 45th AGM, Conference and Exhibition will serve to connect shipping industry players with new ideas and opportunities that will allow them to remain viable in the competitive global market. I am certain that all the participants will enjoy the discourse and planned events and I look forward to robust and productive dialogue during the conference.



Grantley Stephenson
President
Caribbean Shipping Association

HARBOR VIEW





PORT LAFITO

This is Haiti's newest terminal, Port Lafito. This photograph was taken just before the port's official opening in July while the 450 meter quay was still under construction.

Port Lafito is Haiti's first panamax port (with 12.0 meters depth) and the multi-million-dollar project is a private, public and international partnership led by the GB Group.

Port Lafito is working in partnership with Seattle-based SSA Marine, the world's largest independent and privately held marine terminal operator. (See full story on Page 29.)

A NON-STOP SUCCESS STORY



Ever since privatisation in 1993, when the Colombian government opted to divest itself of its inefficient and troublesome Colpuertos network, there has only been one direction of travel for the nation's three main Caribbean coast ports of Cartagena, Santa Marta and Barranquilla.

All three have been hugely successful, but one in particular stands out. That port is Cartagena – or, more correctly, Sociedad Portuaria Regional de Cartagena (SPRC), the company formed in the early 1990s by local investors to run the former state-owned harbor.

Fast forward 20 years or so and Cartagena is a port much admired not just in the Caribbean but around the world. And if CSA's highly coveted Caribbean Port of the Year Award were the Jules Rimet Trophy (presented to winners of FIFA World Cups until won outright by Brazil in 1970) then SPRC's boardroom would no doubt be the proud permanent custodian of the prestigious annual accolade.

Moreover, the company has almost single-handedly dispelled many unflattering myths once held about Colombia, a nation that is South America's third-biggest economy and has seen remarkable growth in recent years. As, of course, has SPRC.

By any measure, this growth is hugely impressive. SPRC is estimating total container throughput figures of 2.65 million teu for calendar 2015. This would represent a rise of just over 11 per cent compared with 2014, itself a particularly busy 12 months for the port operator.

CAPACITY

Current installed capacity is around 3.5 million teu, so there are no immediate traffic constraints. But by 2018 SPRC's target is to reach an annual capacity of 5 million teu.

This target is assisted by the fact that the port's access channel is already 20.5 meters deep, while depth alongside the quay is scheduled to be dredged to minus 16.5 metres by mid 2016. To handle current traffic volumes, SPRC has 15 super post



panamax STS cranes and five mobile cranes of 100 tons capacity. In August SPRC took delivery of a further five new ZPMC STS super post panamax cranes and these were due to enter service during October and November. Beyond this latest delivery,

Sociedad Portuaria Regional Cartagena (SRPC) is a port that is much admired, not just in the Caribbean but around the world



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SPRC has plans to install a further 21 super post panamax cranes. Meanwhile, two old post panamax cranes are scheduled to be dismantled.

There are currently 43 rubber tired gantry cranes, but SPRC ultimately hopes to operate a fleet of 74. Twelve new units are scheduled for delivery in the first two months of 2016 along with another multi-purpose mobile crane.

REACH STACKERS

There are 14 reach stackers in operation. SPRC says these will not be added to for the time being, although it is understood that in the future units will be replaced 'as and when'. Meanwhile, SPRC's fleet of 154 terminal trucks is to be expanded to 169 units.

It's not just a case of buying more and more hardware, however. SPRC is busy

creating the right kind of operating environment. To this end it is building a new training center, installing better simulation software, analysing demand peaks, working on new stacking strategies and dealing with idle time and queues as well as using automated planning algorithms.

Beyond the terminal gates, SPRC is backing the creation of a new container terminal on the Magdalena River. The aim is to reduce hinterland costs and provide an alternative route from the port to a range of inland destinations.

The opening of the enlarged Panama Canal has been put back on a number of occasions, but this has allowed many ports to be more than ready for its impact on trade, and SPRC is no exception. Cassalins Delvalle, sales and marketing manager of SPRC, says: "It will allow the arrival of NPX



CRUISING TO SUCCESS

It should not be forgotten that while SPRC's success in the container sector is highly impressive, the company is also a major participant in the cruise sector.

In 2014 the Cartagena Cruise Ship Terminal handled 366,096 passengers and 149,256 crew – or 515,352 visitors in total.

The port received 219 cruise calls, a modest 3.3 per cent increase on the previous 12 months. SPRC works closely with local stakeholders on a city-based strategy to attract more international visitors. This is evident from improvements to Cartagena's hotel infrastructure, the upgrading and expansion of Rafael Núñez International Airport and efforts to ease traffic congestion and to build new highways.





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vessels of 12,000 teu, which the Port of Cartagena is now ready to handle. And we believe this will enable the Port of Cartagena to consolidate its position as a main container transshipment hub in the Caribbean.”

SPRC is a corporation that embraces, among other assets, the SPRC Terminal, Contecar Terminal, Cartagena de Indias Cruise Ship Terminal and Terminal Fluvial de Andalucía (the river terminal, currently under development). Delvalle explains: “Our organization is responsible for 93 per cent of Cartagena’s total container throughput and 65 per cent of Colombia’s box traffic. Even though our organization handles diverse cargo types, we focus primarily on containers.”

ILLUSTRATED

It’s often forgotten that SPRC is not the port of Cartagena and the Port of Cartagena is not SPRC and this is illustrated by the fact that seven per cent of the port’s container traffic is not handled by the corporation. There is a subtle difference between the two that is set to become more marked as others see the strategic potential of Cartagena as a location.

So, for example, elsewhere in the port APM Terminals and the local port and terminal operating company Compañía de Puertos Asociados (Compas) have just signed a joint venture agreement to manage and operate Compas’s existing 22 hectare multipurpose Cartagena Terminal. APM Terminals and Compas will together invest over US\$ 200 million in upgrading and expanding Cartagena Terminal including the purchase of state-of-the-art handling equipment.

As a result of the deal, Cartagena Terminal becomes the sixth operational Latin American facility within the APM Terminals global terminal network. When complete, the upgrade will triple the terminal’s annual throughput capacity and enable the facility to handle the larger vessels transiting the newly widened Panama Canal. While Compas will continue to be the concession holder, APM Terminals will gain a 51 per cent majority share in the joint venture that will run the terminal.

The Compas Cartagena Terminal currently has an annual throughput capacity of around 250,000 teu and 1.5 million tonnes of general cargo and is equipped with three 45-tonne Liebherr mobile cranes.

TERMINAL

Compas, meanwhile, operates a second terminal in Cartagena specializing in the handling of grains, liquids, breakbulk cargo and vehicles, managed in association with Chile’s SAAM and Abonos Colombianos (Abocol).

In a separate development – one that reinforces Cartagena’s position as more



than just a container hub – Pacific Exploration & Production Corp began operations at the new multimodal Puerto Bahía, a 55 hectare site on Isla Barú in Cartagena Bay. The terminal officially commenced liquid and bulk handling operations in August. Pacific has a 41.65 per cent equity interest in Pacific Infrastructure Ventures Inc, the private company that developed Puerto Bahía. The port, built at a cost of around US\$ 600 million, consists of two terminals: a hydrocarbon terminal and a dry cargo terminal. Liquid storage will be handled by the Dutch company Oiltanking International.

So it’s not just SPRC that is expanding. It seems that Cartagena is the place to be – and not only for handling containers.

Beyond the terminal gates, SPRC is backing the creation of a new container terminal located on the Magdalena River



Niche sector finds a fair wind

Take an idyllic setting like the Caribbean and add the beautiful silhouette of a full-sized sailing ship and you have an aspirational icon. Who wouldn't want to go cruising in such a vessel? But how far has this niche sector developed - and what does the future hold? John Tavner reports.

Sailing the Caribbean in a yacht is a hugely popular pastime for very obvious reasons. In addition to the balmy conditions and beautiful island scenery, there is the magic ingredient of moving under sail – that special link with the past that comes with harnessing the power of the wind.

But what happens when you take this idea and scale it up? Is there an even greater thrill to be had from travelling in a proper sailing ship – one at least as big as the clippers and windjammers that were still being used commercially in the early 20th century?

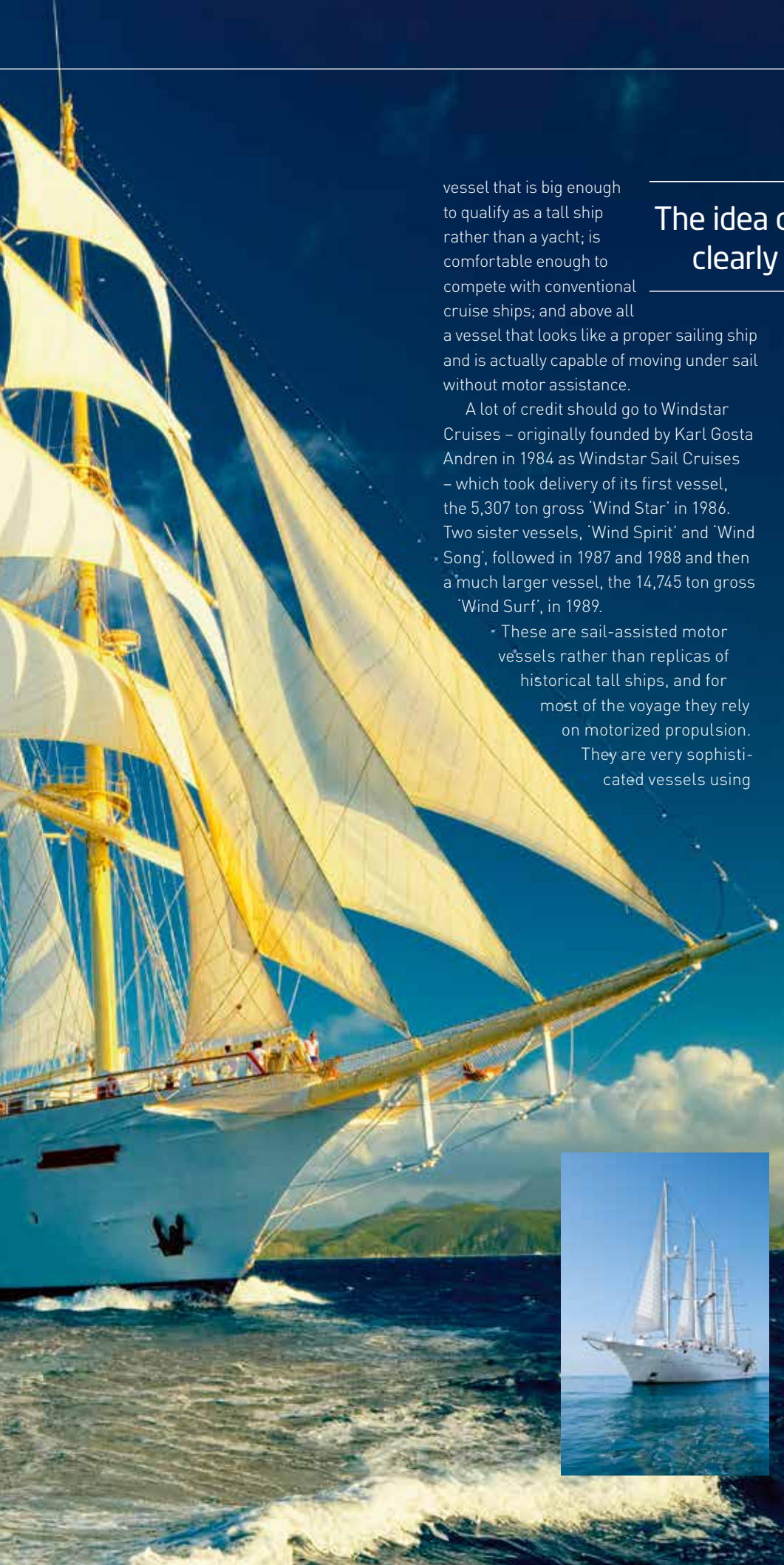
Well, ask anyone who has spent time on board a sail training vessel or other modern-day tall ship and the answer is

bound to be in the affirmative. More masts and a greater spread of sail can only add to the sense of romance and adventure. But, on the negative side, crewing a tall ship is not for the faint-hearted. The task of hoisting square-rig sails and adjusting them with ropes and tackles is back-breaking, labor-intensive work. Conditions on board are likely to be spartan and seasickness is part of the package.

Yet the idea of a voyage in a tall ship is clearly one that has mass appeal. You only need to think of how cinema audiences around the world responded to 'Pirates of the Caribbean' to understand the potential size of the market.

So the challenge, for those looking to exploit this market, has been to develop a





vessel that is big enough to qualify as a tall ship rather than a yacht; is comfortable enough to compete with conventional cruise ships; and above all a vessel that looks like a proper sailing ship and is actually capable of moving under sail without motor assistance.

A lot of credit should go to Windstar Cruises – originally founded by Karl Gosta Andren in 1984 as Windstar Sail Cruises – which took delivery of its first vessel, the 5,307 ton gross ‘Wind Star’ in 1986. Two sister vessels, ‘Wind Spirit’ and ‘Wind Song’, followed in 1987 and 1988 and then a much larger vessel, the 14,745 ton gross ‘Wind Surf’, in 1989.

- These are sail-assisted motor vessels rather than replicas of historical tall ships, and for most of the voyage they rely on motorized propulsion. They are very sophisticated vessels using

The idea of a voyage in a tall ship is clearly one that has mass appeal

computerised technology to adjust the sails. They are fitted out to a high standard with luxury accommodation. This and the ‘boutique’ size of the Windstar vessels has given the company an exclusive image that has attracted a following of discerning customers.

DREAM

Then in 1989 the Swedish entrepreneur and classic boat connoisseur Mikael Krafft founded Star Clippers with the aim of fulfilling his dream of creating modern-day sailing ships based on actual clipper designs from the heyday of commercial sailing ships.

His first two vessels were the identical four-masted barquentines ‘Star Flyer’, launched in 1991, and ‘Star Clipper’, in 1992. Each with a capacity of 170 passengers and 74 crew, these vessels measure 115.5 meters in length with a total sail area of 3,365 square meters.

STAR, SPIRIT AND SURF

Windstar Cruises currently operates three sail-aided vessels. The ‘Wind Star’ and ‘Wind Spirit’ each have a capacity of 148 passengers and 90 crew, while the ‘Wind Surf’ carries 310 passengers and 191 crew. All three vessels were renovated in 2013. Windstar has invested over US\$ 20 million since 2012 in refurbishing its sail-aided vessels.

In addition to its sail cruiser fleet, Windstar Cruises operates three ‘power yachts’, acquired from Seabourn Cruise Line and all recently renovated. These vessels have doubled the size of Windstar’s fleet. With a total of 1,242 berths, Windstar is now the market leader in small ship cruising with 300 or fewer passengers.



SAIL CRUISING

These were the first sailing clippers to be built since 1910. In July 2000 Krafft added a third vessel, 'Royal Clipper', a square-rigger with 42 sails. 'Royal Clipper' holds the Guinness World Record for the world's biggest five-masted ship.

SISTERSHIP

Meanwhile, yet another large sailing – or rather sail-assisted – vessel can be seen cruising the Caribbean during the winter season. This is the 187 meter 'Club Med 2', a sistership of 'Wind Surf', which has been in service with ClubMed since 1992.

There is no question that operators of luxury sailing ships have tapped into an enthusiastic niche market. In addition to the obvious appeal of cruising under sail, the boutique dimensions of these vessels mean that passenger numbers are limited and so each guest can expect that much more in the way of luxury and personal service. Not only that, but the sailing vessels are able to access ports and harbors in the Caribbean often unvisited by conventional cruise ships.

"Being on Windstar is like being on your own private yacht," chief executive Hans Birkholz told 'Caribbean Maritime'. "You can dine when you want and there are no regimented schedules. Best of all, there are no lines or tons of people to contend with on board."

And Mikael Krafft, of Star Clippers, told us: "Cruising in a clipper gives guests something a little more unusual and individual. The smaller size of the clippers and the nature of them means guests meet up with other like-minded passengers and the overall atmosphere on board is always very relaxed and sociable."



'Being on Windstar is like being on your own private yacht, you can dine when you want and there are no regimented schedules'

CLIPPER FLEET'S NEW STAR

In late 2017 Star Clippers will inaugurate a new vessel, its first newbuild since 'Royal Clipper'. This will be the world's largest square rigger, carrying 300 passengers, measuring 8,770 tons and powered by more than 6,350 square meters of sails. It is being built at the Brodosplit shipyard in Croatia.

While the 'Royal Clipper' is modelled on the legendary German sailing ship 'Preussen', the new vessel will be a near-replica of the even more dramatic 'France II', commissioned in 1911. Just as the original 'France II' eclipsed 'Preussen' more than a century ago as the world's largest square rigger, the Star Clippers newbuild will replace its sister, 'Royal Clipper', as the largest ship of its kind afloat today.

The new ship will initially sail the company's most popular itineraries in the Mediterranean and the Caribbean. Sales are expected to open in 2016.





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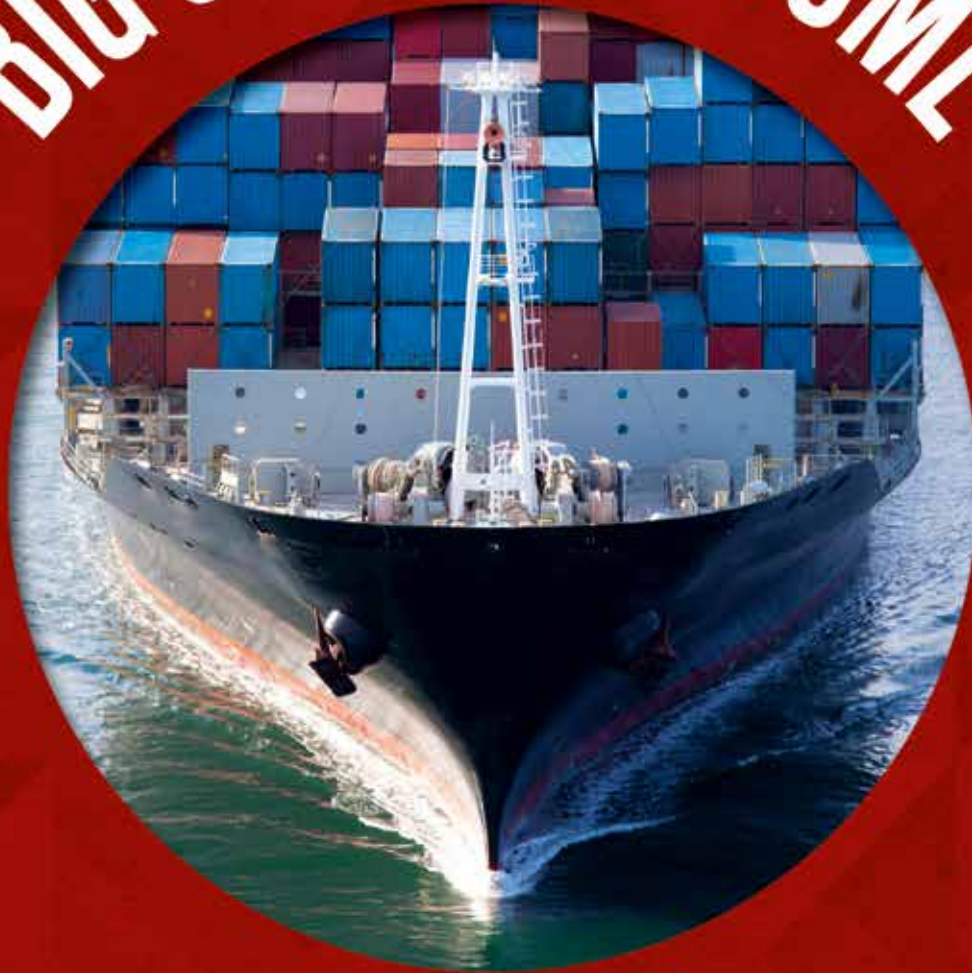


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All three companies report that business is growing and both Windstar and Star Clippers are expanding their fleets – although it may be significant that Windstar’s latest additions, ‘Star Breeze’ and ‘Star Legend’, are ‘power yachts’ rather than sail-assisted vessels.

Mr Birkholz told us: “As we continue to grow we look for additional capacity. In 2014 we had one new power yacht join our fleet and in May of 2015 we had two additional power yachts join Windstar, bringing our total fleet to six yachts and 1,242 berths. This has all been accomplished while keeping our ships small, with less than 300 guests aboard each.”

UPBEAT

And Mr Krafft gave a similarly upbeat assessment of his company’s progress: “The business will continue to grow as it has done since the original three ships in the fleet were built. An indication of the company’s confidence is the current construction of a new ship, the largest to date, which is due to come into service in late 2017.”

The building of this latest ‘super clipper’ may also be an indication of Mr Krafft’s personal passion for traditional tall ships. Asked about the cost of building and maintaining this kind of vessel, he said: “They are built to very high standards and still require the varied skills of a great number of craftsmen to recreate the original structure of the historical clipper ships. They cannot be compared with conventional cruise vessels, which are built in a very different way; but, comparing square footage, they will be at least as expensive to build and maintain.”

So what are the benefits to the Caribbean maritime sector of hosting these sail-aided cruises? Clearly, they attract a number of well-heeled visitors to the region – although, due to the limited size of the ships, the numbers are not huge. But in terms of prestige, there is nothing that enhances the status of a Caribbean harbor so much as the presence of an elegant full-sized sailing ship. Image may not be everything, but in visual terms it can be a powerful marketing tool for tourist boards across the region.



IN THE CARIBBEAN

Windstar Cruises will have two sail-aided vessels cruising in the Caribbean this coming season. ‘Wind Star’ will operate out of Bridgetown and ‘Wind Surf’ out of Sint Maarten. The three power yachts ‘Star Breeze’, ‘Star Legend’ and ‘Star Pride’, will also be deployed in the Caribbean – home-porting out of Sint Maarten, San Juan and Bridgetown respectively.

Star Clippers currently operates three ships in the Caribbean, offering sailing voyages between November and April. The flagship ‘Royal Clipper’ operates from Bridgetown, ‘Star Clipper’ from Sint Maarten and ‘Star Flyer’ in Cuba and the Cayman Islands.

The ‘Club Med 2’, with 184 cabins, offers cruises with calls mainly in Martinique, Guadeloupe, Venezuela, the Grenadines and Sint Maarten, using Fort-de-France and Pointe-à-Pitre as its main home ports, but also Philipsburg.



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NEW WATERWAY STILL AT PRELIMINARY STAGE

The project which the Chinese concessionaires have dubbed the Nicaragua Inter-oceanic Grand Canal is still very much in the preliminary stages, with no definite word of a start date for construction.

The plan is to build a 278 km canal – three and a half times as long as the Panama Canal – from Punta Gorda on the Caribbean coast to the mouth of the River Brito on the Pacific. Cost of construction has been put at US\$ 40 to 50 billion and it will take six to 10 years to complete.

The project was due to get under way in December 2014. So why has there been so little activity to date?

SCRUTINY

HKND Group – the Chinese company which has been awarded the contract to build the new canal – said in a company statement on 21 September that it had been “under international scrutiny” and that the project

“had aroused heated discussions including positive expectations, objective considerations and also doubts and pessimism”.

In an interview, Pang Kwok Wai, executive vice president of HKND, said: “Nicaragua Canal is the largest civil engineering project in history. We must ensure project safety, a smooth resettlement program and environmental sustainability to promote Nicaragua’s social and economic evolution for the benefit of its people. Therefore, we must step up our efforts in preliminary study and logistic support before kicking off major works. In this regard, HKND announced the commencement of access road construction last December, where we already completed upgrading of local roads leading to the port and lock on the Pacific side.

“In May we have completed the ESIA [environmental and social impact assessment] study and handed it over to the Nicaragua authority for their internal review and approval.”

HKND Group said it had been ‘under international scrutiny’ and that the project ‘had aroused heated discussions including positive expectations – and also doubts’

AERIAL SURVEY

An aerial survey of the canal route and Lake Nicaragua shoreline is to be carried out by CSA Global, an international geological and resource consultancy based in Perth, Western Australia, which signed an agreement on 19 August with HKND Group at its head office in Hong Kong.

The survey consists of aerial mapping of topography, photography and geophysical and geological data. HKND senior adviser John Murray said: “The survey is a major step in the construction development process and supports pre-works planning, design and engineering for the canal and infrastructure.”

CSA Global will use advanced PPP [precise point positioning] technology to carry out the survey. The airborne laser radar is able to penetrate the dense forests and detect clearly the actual topography and surface water. When it is applied to the Lake Nicaragua section, the lakebed topography of 8.0 to 10.0 meters below the surface can be displayed with detail.

The survey will cover a 10 km wide swathe along the 276 km canal route and the 2 km wide circumference of Lake Nicaragua. The survey was expected to commence in September 2015 with completion by March 2016.

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Grand Cayman cruise pier project stalls following environmental study



Arguments are reaching fever pitch on Grand Cayman Island over the government's proposal to build two cruise piers in an effort to boost its cruise tourism sector.

While the benefits to the cruise ships are obvious – more passengers can be brought ashore more quickly – there are serious concerns about the environmental damage the construction will cause. According to some reports it will destroy most of Grand Cayman's famous dive sites, close to the proposed location.

The proposal has met a lot of opposition. In fact, it is hard to find any person, business or organization in favor of the project, except perhaps the big cruise lines it is being built to serve.

One report estimated the piers would create 1,000 jobs and would be worth US\$ 250 million to the economy over the next 20 years. It has also been reported that over 80 per cent of local businesses are against the proposals because of the potential for irreversible environmental damage.

The five dives sites of Eden Rock, Balboa, Cali shipwreck, Soto's Reef and Devil's Grotto, as well as Stingray City – a series of shallow sandbars in the North Sound of Grand Cayman where southern stingrays are found in abundance – are the island's main tourist attractions. All are located close enough to the proposed piers to cause serious worry.

All cruise ships are currently held at one of four offshore deepsea anchorages, with passengers being tendered ashore to the George Town terminal – a time-consuming and laborious operation, especially when four cruise ships are in port at the same time.

During 2015 Grand Cayman is expected to welcome around 2 million passengers

and more than 600 cruise ship calls. The tourism sector generates US\$ 9 million a year for the country.

A government-commissioned study into the cruise sector recommended the construction of the two piers at the same location as the current anchorages in George Town harbor.

The proposed piers will be 300 meters long and 30 meters wide so that four vessels can berth simultaneously. Two of the existing anchoring points will remain in operation, allowing the port to handle six vessels each day.

DREDGING

The piers have been aligned to minimize the need for dredging, but some dredging will be essential to deepen the berths to 36 ft to allow Oasis-class cruise ships to call. An estimated 626,000 cubic meters of spoil will be moved, most of which will be used for land reclamation onshore for the new facilities.

An environmental impact assessment (EIA) reported that several hundred thousand square feet of reef would be completely destroyed as a result of the dredging and construction of the cruise berths, having "significant negative impacts on the marine ecology within the George Town Harbor areas."

The report revealed that the damage to the seabed and the silt created by the marine works would kill the reef and destroy virtually all marine life in the area. Grand Cayman is famous for its dive sites, which are often ranked as the best in the Caribbean.

Suggestions to relocate the reef have been met with skepticism due to the high cost and the long-term viability of such

operations, although similar projects have been successful.

The government sees the development as essential to improve its cruise product as well as boosting the nation's economy. However, the flipside is that the piers could destroy most of the island's attractions, which in turn would reduce the attraction of Grand Cayman as a cruise destination.

The nation has been polarized on the proposals, weighing the potential economic benefits against the very real environmental concerns. This has been widely described as the biggest decision the country has had to take for a generation – a turning point in its history.



PORT BRIEFING

PANAMA – NEW CRANES FOR MANZANILLO

Manzanillo International Terminal (MIT) has taken delivery of four ZPMC super post panamax gantry cranes as part of its ongoing US\$ 270 million expansion program.

The four new cranes will increase MIT's total handling capacity from 2.5 million to 4 million teu. These cranes can handle the largest vessels in service and can be operated by remote control. Each crane has a reach of 25 container rows on deck.

The cranes are expected to be commissioned in October. This will bring MIT's crane numbers to 11 post panamax and eight super post panamax units. MIT has the second-highest volume of container movements in Panama.

Phase 1 of MIT's expansion program will be completed by the end of 2015. As well as the four new cranes, this will include an additional 395 meter post panamax berth and new ro-ro dolphins to allow two ro-ro vessels to be handled at the same time. MIT also became the first port in Latin America to install automatic stacking cranes in June 2015.



COLOMBIA – APM TERMINALS IN NEW JOINT VENTURE

A joint venture between the global container ports operator APM Terminals and Compañía de Puertos Asociados SA (Compas SA) in Cartagena will see investment of over US\$ 200 million in new equipment and an upgrading and expansion of the jointly managed and operated terminal.

Annual throughput capacity will be tripled to allow the terminal to handle the larger vessels expected to transit the widened Panama Canal. The terminal currently has a capacity of 250,000 teu and 1.5 million tons of general cargo.

APM's first venture into the Colombian market joins five other terminals in its Latin American network. While Compas will continue as concession holder, APM will hold 51 per cent of the shares. The venture is still to be approved by the relevant authorities.

USA – NEW LOGISTICS CENTER FOR PORT CANAVERAL

A ground-breaking ceremony was held at Titusville, Florida, on 27 July as construction of the Port Canaveral Logistics Center gets under way. It will be the port's first offsite warehouse and a major step towards its ambition to create a world-class logistics hub in Central Florida.

The center is being funded and developed by Flagler Logistics, a Florida-based logistics, supply chain solutions and real estate developer. Under the terms of the development the port authority will lease the center, with a further option to buy, and then sub-lease units to the port's customers. It is predicted that a strong logistics industry in the region would create up to 15,000 jobs over the next decade, so this development has been met with great interest.

The Port Canaveral Logistics Center will feature 246,240 sq ft of dividable space with 30 ft clearance, truck bays and railside loading doors, with a new spur being built from the nearby Florida East Coast rail line. It is scheduled for completion by May 2016.

USA – NEW CONTAINER TERMINAL AT PORT CANAVERAL

Port Canaveral unveiled its new dedicated container terminal, Canaveral Cargo Terminal (CCT), on 12 June.

CCT has an initial capacity of 200,000 teu with 20 acres of stacking areas. There are plans to extend this to 750,000 teu capacity as demand grows. The two-berth terminal is equipped with two cranes.

The terminal is the result of a US\$ 100 million investment by Gultainer, the world's largest privately owned terminal operator, through its US subsidiary, GT USA – the company's first such venture in the US. In 2014 Canaveral Port Authority signed a 35-year agreement with GT USA to operate and develop the container and multipurpose cargo terminal.

JAMAICA – KWL INVESTS MORE

An extra US\$ 30 million could be ploughed into the third phase of the development of Kingston Wharves Limited (KWL). Original estimates of US\$ 70 million have been increased to US\$ 100 million (JM\$ 11.6 billion) in response to higher demand for its logistics services.

To date around US\$ 8 million has been spent on the expansion program, which will be completed in 2019. Construction is expected to

start before year-end of a 160,000 sq ft logistics complex with individual units of 10,000 sq ft for manufacturing, distribution and logistics companies. It is expected to be opened by 2018. While acquisition of further post panamax cranes is in the budget, the focus for 2015 has been on expanding port boundaries and building on the free zone status.

KWL currently has capacity for 450,000 teu. It handles about 200,000

teu per year but has set its sights on handling 1 million teu by 2019.

In 2016 the container yard will be reconfigured and the new logistics IT system will be rolled out. Dredging of the harbor to handle post panamax vessels will continue through to 2017.

KWL is leased by the Port Authority of Jamaica on a 30-year concession to a consortium made up of CMA CGM and Terminal Link.



PORT BRIEFING

CUBA – CRUISE INDUSTRY TAKES ADVANTAGE OF NEW POLITICAL CLIMATE

The thawing of relations between the United States and Cuba after half a century of US-imposed trade embargo is opening up many new possibilities for trade and tourism for both countries.

In recent months several announcements have been made regarding plans for new cruise and ferry services.

In August the luxury yacht 'Still Water' was reported to be the first US vessel to legally transport passengers to Cuba. It docked at the Hemingway Marina in Havana after the four-hour crossing.

In May 2015 the US Treasury Department began granting licenses to ferry services from its southwestern ports for the first time in 50 years. News is scant, but the long-awaited services were expected to commence this fall.

In the cruise sector, MSC Cruises has announced it will homeport in Havana from

December 2015 after moving the 'MSC Opera' from Europe. It will offer 16 cruises over the 2015-16 winter season calling Jamaica, Cayman Islands and Mexico as well as two and a half days in Havana.

Carnival Corporation has also announced that it will be the first US-based cruise operator to sail to Cuba. Cruises will begin May 2016 with its recently launched Fathom brand, which focuses on 'social impact' travel, one of the approved categories for legal travel to Cuba. Carnival will offer seven-day voyages from PortMiami on the 710-passenger 'Adonia'.



COLOMBIA – PUERTO BAHIA OPENS IN CARTAGENA

The new Puerto Bahía multimodal terminal in Cartagena, entered service on 28 August. The US\$ 600 million terminal is on a 155 hectare site on Isla Barú in Cartagena Bay. It consists of a hydrocarbon terminal and a dry cargo terminal.

Puerto Bahía has been created by Colombia-based port developer Pacific Infrastructure Ventures Inc. The Canadian-based oil and natural gas company Pacific Exploration & Production Corp has a 41.65 per cent share in Pacific Infrastructure.

The hydrocarbon terminal has eight storage tanks with a combined capacity of 2.4 million barrels for naphtha and crude oil and is capable of loading suezmax tankers.

The dry bulk terminal has 300 meters of berthing and can handle post panamax vessels. The port has a draft of 20.0 meters.

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STARBOARD BRIEFING

RECORD PASSENGER NUMBERS FOR CARNIVAL FROM NEW ORLEANS



Since the Port of New Orleans began promoting itself as a premier cruise destination in 2001 it has experienced a 180 per cent growth – and a key part of that has been the involvement of Carnival Cruise Line.

In total during 2015 the line expects to carry a record 400,000 passengers from New Orleans. Car-

nival launched year-round cruising from New Orleans in 1994 and has continued to increase capacity year by year apart from a 14-month hiatus following Hurricane Katrina.

Carnival has become the port's largest cruise ship operator, offering in excess of 125 departures a year on its two vessels, the 3,646-passenger

'Carnival Dream', (seven-day Caribbean cruises) and the 2,052-passenger 'Carnival Elation' (four and five-day cruises to Mexico). The 'Carnival Elation' will be replaced by the 2,758-passenger 'Carnival Triumph' in spring 2016, boosting capacity still further. In 2016 the line expects to carry 450,000 passengers from New Orleans.

PROPOSED NICARAGUA CANAL GETS PUBLIC VOTE

Discussions over the feasibility and benefits of the Nicaragua Canal proposal undergone a series of twists and turns in recent months.

But one piece of good news for the developers is that, in a recent public vote, HKND (Hong Kong Nicaragua Canal Development) received 78 per cent approval for the canal.

The public backing, however, is on condition that the canal route avoids the town of El Tule, which has

opposed the project. This will add around US\$ 700 million to the cost.

According to some reports, the HKND Group is due to start work soon at Puerto Brito, on the Pacific side, as well as on the Puerto de Punta Águila terminal on the Atlantic side. Expectations remain that main construction will commence by the end of 2015.

Since the project was announced in 2014 the proposed US\$ 50 billion

canal has been the subject of much debate about its financial feasibility and environmental impact. However, after completion of a feasibility study, a spokesman said: "The project offers potential benefits for the environment and the people of Nicaragua." The long-awaited investment is reported to have been secured from Europe, Asia and America.

The canal is anticipated to be completed and operational by 2020.

PANAMA CANAL 'ON TRACK FOR EARLY 2016'

Despite a series of further setbacks and challenges, the Panama Canal expansion is still "on track to be completed in early 2016". Current work



is focused on the electro-mechanical phase of construction.

Disputes and strikes have delayed the completion of the canal for two years longer than originally forecast, but even as it enters its final stages it has been beset with problems.

Flooding of the new locks commenced in June this year, but by August a crack had been found in the Cocolí Locks on the Pacific side. Videos have been released online showing water pouring through

a huge crack running the length of the foundation. The Panama Canal Authority (ACP) glossed over the incident, saying repairs would take only a month to complete and would not delay the new scheduled opening date of April 2016.

Another hindrance was the setting of temporary draft restrictions on vessels transiting the canal because of drought caused by El Niño. This was expected to affect around 18 per cent of vessels transiting the canal. Further restriction may be announced if the drought continues.

TAMPA BAY GETS SECURITY GRANT

One of Florida's largest seaports, Port Tampa Bay, has been awarded a US\$ 1.6 million grant for port security funding by the US Federal Emergency Management Agency as part of the US\$ 100 million Port Security Grant Program. The port authority plans to invest this in safety and security-related projects such as cyber security assessment and monitoring and detection as well as a waterborne barrier system that can be deployed in critical areas.

Port Tampa Bay has acquired significant funding for its security enhancements and infrastructure in recent years, owing partly to the spread-out nature of its facilities, which require remote monitoring and controlled access.



JUMBO CRUISE SHIP HEADING TO FLORIDA

The world's fifth-largest cruise ship, 'Norwegian Epic', will soon be homeporting at Port Canaveral after moving there in November 2016. The 155,873 ton gross vessel is the largest ship in the Norwegian Cruise Lines fleet with an overall length of 1,081 ft and a capacity of 4,100 passengers.

The 'Norwegian Epic' will offer six and seven-day cruises to the eastern and western Caribbean as well as shorter cruises to The Bahamas.

It will join Royal Caribbean International's 5,400-passenger 'Oasis of the Seas', which arrives the same month.

STARBOARD BRIEFING

CLEARING THE MAGDALENA RIVER

One of Colombia's former major transport routes could get a new lease of life as a US\$ 1.3 billion project to clear and dredge the Magdalena River gets under way. The contract was awarded to the Navelena consortium, headed by Brazil's Odebrecht SA.

Just over 900 km of the river between the Port of Barranquilla on the Caribbean coast and the town of Puerto Salgar will be deepened and maintained in the contract, which runs for 13.5 years.

In order to achieve an efficient movement of barge transport, the river will be maintained at a depth of 2.0 meters and a width of 52 meters with a bend radius of at least 900 meters, allowing six barges of 1,200 tons per convoy to navigate safely.

Currently, traffic is limited to small barges navigating a 250 km stretch between Puerto Salgar, near the capital, Bogota, and Barrancabermeja.

Once the project is complete, and traffic can once again reach the Caribbean coast, a fivefold increase in river usage to 10 million tones by 2029 is forecast. Exporters and

importers in the interior of Colombia currently rely on truck transport to reach the seaports, with drivers having to deal with excessive congestion, avalanches and poor road infrastructure. Around 220 million tons of cargo is currently carried on the route by road.

The funding comes mainly from Navelena, which will be allowed to charge tolls for seven years after the upgrade. Additional funding is coming from the state-owned Ecopetrol and Impala Terminals, a subsidiary of Swiss commodities trader Trafigura.

The government estimates that transit times between the coast and Bogota will be halved to just six days using a combination of road and river transport. One convoy of barges could transport 7,200 tonnes in one trip. The equivalent by road alone would require 240 trailers. Estimates for savings in logistics costs vary between 30 and 50 per cent.

Predictably, the ambitious project faces opposition from the already struggling road haulage industry as well as from environmentalists.

BOOM IN VISITORS TO THE REGION

According to a new report from the Caribbean Tourism Organization, the region is experiencing a significant growth in tourism numbers. There was a six per cent growth in tourism arrivals in the first quarter of 2015, the 17th successive quarter of reported growth. In the first three months of 2015 the region welcomed over 8 million visitors.

Several cruise ship destinations are also reporting a significant growth in arrivals. In Puerto Rico passenger numbers were up 26 per cent in the first quarter of this year compared with 2014. In the first three months of 2015 the destination received over 520,000 cruise passengers. Much of this increase was attributed to the expansion of the cruise ship pier in Old San Juan, allowing mega ships to call.

Trinidad & Tobago has also reported a record increase, growing by 104 per cent over the past year. In the first half of 2015 T&T received almost 45,000 cruise passengers, making it the fastest-growing cruise destination in the region.

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PORT LAFITO OPENING

PANAMAX TERMINAL IS MAJOR BOOST FOR HAITI

Rebuilding Haiti after the devastating earthquake of January 2010 has been no easy task; but with both public and private investment it is advancing steadily.

One of the more significant projects has been the development by GB Group of its Port Lafito project, an ambitious multi-million-dollar undertaking to create a panamax container terminal.

The new terminal is situated on some 400 hectares of ocean-front land 20 km north of Port-au-Prince.

Located nearby is the Lafito Global economic zone. It is hoped that this development, the first of its kind in Haiti, will help the country become an economic and industrial hub for the region. When

complete, the development will include an industrial free zone, a business park, a residential area, a country club and an ocean club. It is expected to generate some 25,000 jobs by 2020.

It is hoped that this development, the first of its kind in Haiti, will help the country become an economic and industrial hub for the region

With 450 meters of berth and a draft alongside of 12.5 meters, Port Lafito is the deepest-water harbor in Haiti. There are plans in place to lengthen the berth to 900 meters in the future. The new terminal will handle containerized and loose bulk cargo

using state-of-the-art equipment. The software for the terminal operating system (TOS) has been developed by Tideworks Technology.

The multipurpose terminal is located alongside Route Nationale 1. Access roads provide links with the main highways to northern, central and southern Haiti.

The chief executive of GB Group, Reuven Bigio, said: "Port Lafito will breathe new life into Haiti by creating new jobs, training for skilled labor and encouraging foreign investment and development. This project will make a significant impact on the national economy and have a beneficial impact on the more than 10 million people that live here. We are proud to announce that the day has come where





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we can help bring Haiti to the forefront of modern logistics. None of this would have been possible without the support from our public and private partners, for which we are very grateful.”

The inauguration ceremony in July was attended by Haitian dignitaries, government officials and partners who had made the project possible. In addition to Reuven Bigio they included Michel Martelly, President of Haiti; Gilbert Bigio, chairman of GB Group; Carlos Urriola, senior vice president of SSA Marine; and Alix Célestin, general director of the Autorité Portuaire Nationale (APN).

Haiti’s first panamax port will be managed and operated by SSA Marine, the world’s largest private marine terminal operator, in a partnership with GB Group. Two Liebherr LHM 420 mobile harbor cranes, the first of their kind in the Caribbean, have been installed at Port Lafito, and agreements are already in place with Evergreen Marine and King Ocean Services to include Lafito as a port of call.

The Lafito Industrial Free Zone is being developed within Lafito Global to attract international manufacturing companies and revitalize foreign investment in Haiti. The free zone will contain support services and infrastructure including a 25 MW power plant. Tenants will benefit from fiscal advantages extended to manufacturers producing

in Haiti for export to the United States

The whole project has been led by the GB Group through a partnership between the Haitian government, the Haitian private sector and various international financial institutions including the Banque Nationale de Crédit (the Haitian state bank), Capital Bank, Fonds de Développement Industriel, the International Finance Corporation, Nederlandse Financierings-Maatschappij voor Ontwikkelingslanden NV (the Dutch development bank) and Nationale d’Assurance SA.

DIVERSE

GB Group is a diverse group of industrial and trading companies in the Caribbean with operations concentrated in Haiti, Dominican Republic, Jamaica and Sint Maarten and offices in the US. It consists of 21 companies in seven divisions: agriculture, construction, consumer goods, infrastructure, energy, logistics and trading.

To strengthen the port’s potential, an international sister seaport agreement was signed between Port Lafito and PortMiami to collaborate on exchanging information and ideas with a view to enhancing trade between the two ports.

Haiti is well on the road to recovery. Thanks in great part to this investment – along with other major projects, including



the redevelopment of the national ports in Port-au-Prince and Cap Haïtien and the import of building materials and equipment – Haiti is now seen as one of the strongest economies in the Caribbean region, with forecast growth through 2015 of 3.7 per cent – the second-highest in the region.

Finally, it seems, there is some good news for the beleaguered nation of Haiti.



The inauguration ceremony in July was attended by Haitian dignitaries, government officials and partners who had made the project possible

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EFFECTIVE TECHNIQUES

to sniff out contraband

As the methods used by drug smugglers become ever more diverse, law enforcement agencies in the Caribbean are looking to cutting-edge ways of detection. But simple, common-sense techniques can be invaluable, too, says William Lusk, Director of Operations, Homeland Security Outlook.

Every day, law enforcement and government agencies across the Caribbean Basin are working together to stop the flow of contraband such as illicit drugs and weapons. Marijuana and cocaine in particular, usually destined for the streets of the United States and Europe, are frequently smuggled using conveyances such as commercial and private aircraft, semi-submersibles and shipping containers. Coupled with high motivation and increased sophistication, the threat from smugglers is growing.

Commercial ships transiting the Caribbean are particularly attractive vehicles to transport illicit cargoes and there have been many instances where ships and their crew, rightly or wrongly, have been detained and held responsible for illegal items found onboard. Substantial fines, interrupted cargo operations, lengthy imprisonment and even vessel seizure can result if drugs

Commercial ships transiting the Caribbean are particularly attractive vehicles to transport illicit cargoes

are found onboard. In one such incident in January 2015 a cargo vessel transiting from Guyana to Spain was intercepted by authorities and yielded 120 kg of cocaine, valued at US\$ 10 million, under the wooden base of a container flat rack. The vessel's captain and crew were arrested.

To avoid such unpleasant circumstances, ship masters and vessel security officers must not only remain vigilant but also employ several common-sense techniques



By William Lusk
Director of Operations,
Homeland Security Outlook

and cutting-edge technologies that can help locate contraband onboard, particularly during calls to South American and Caribbean ports preceding arrival into the US and Europe.

TECHNIQUES

Although there is no way to fully mitigate the risks, certain techniques can be employed that will help lower the probability that your vessel will inadvertently become a drug mule.

The first and most critical questions to ask are:

- What is my plan?
- Does the vessel security plan confirm to the ISPS standard?
- When was the last time the plan was exercised, reviewed and updated?



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An exercise itself does not need to be costly in expense or time, but can be simply performed as a five-minute table-top interview with a crew member. Asking how the crew member would react in a given situation not only tests if the security plan would be followed, but it could also expose flaws. The key is to understand the security plan, drill often – and follow it.

To minimize risk of a crew member actively partaking in the smuggling of contraband, ensure that there is clear company policy about drugs and that potential consequences of violation are conveyed. Company messaging can be simple: the risk of complicity to drug smuggling is not worth the reward.

Visual deterrence, both at anchor and while docked, is critical to help mitigate the risk of unwanted contraband from being placed onboard. The two easiest methods to enhance visual deterrence are to establish roaming patrols and to use bright lighting around the vessel.

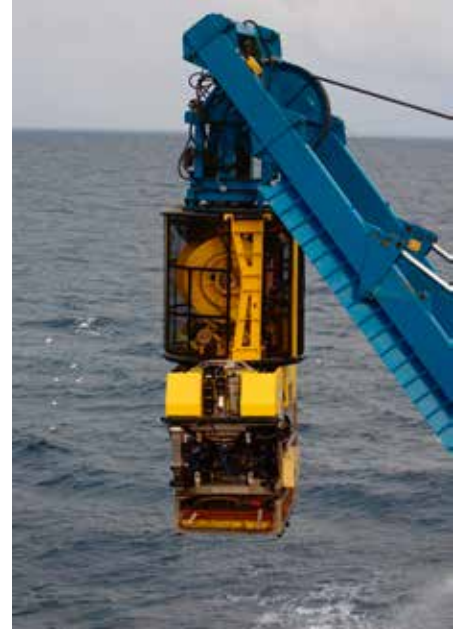
Increasingly creative, parasitic containers are sometimes found bolted or welded onto sections of a ship under water such as

stabilizers, thrusters and rudders. These containers may be installed and retrieved by divers of a smuggling ring. Police dive teams may check vessels on occasion to ensure there is no parasitic contraband, but the job is difficult as they fight currents, low visibility and disorientation.

SOLUTION

The technological solution to this problem is the remotely operated vehicle or ROV. These vehicles are low weight (around 15 lb) and low maintenance and feature powerful sonar and lighting to sweep the hull of a vessel with no risk to a human operator. According to Mark Fleming, defense business development manager for VideoRay: “Intelligence efforts can identify gaps and anticipate threats, but without technological superiority in conducting rapid and thorough searches it is difficult to take action on this intelligence.”

As an example, the Government of Trinidad and Tobago has made significant resources available to the nation’s coast guard to fight illegal drugs; and among the tools at its disposal are ROVs.



Another tool that can almost literally sniff contraband is the MINI Z system developed by American Science & Engineering. This hand-held scanner provides fast and realtime imaging to detect currency, drugs and explosives in hard-to-reach locations behind non-metallic surfaces. The device’s battery operation, wireless communication and scanning speed of 15 cm per second makes it a fast and appealing method of sweeping an area for suspected contraband.

‘Intelligence efforts can identify gaps and anticipate threats, but without technological superiority in conducting rapid and thorough searches it is difficult to take action on this intelligence’

CSA DIARY

14TH ANNUAL CARIBBEAN SHIPPING EXECUTIVES CONFERENCE

11 to 13 May 2015 - British Virgin Islands

CSA delegates gathered in Tortola in May for the 14th CSEC. The British Virgin Islands proved a popular venue for the conference, with a strong number of delegates attending the 'half year' event. As can be seen from these photographs, the CSEC was a mix of hard work and plenty of fun.









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ACP AWAITS DETAILED REPORT ON WATER SEEPAGE

Will the expanded Panama Canal open to commercial traffic in April 2016 as planned – or will there be a further delay as a result of reported leakage problems in part of the new Pacific locks?

That was the question being asked by many in the shipping industry after pictures showing water leaks in one of the new lock heads were posted on social media in August.

At that time, the canal administrator Jorge L. Quijano, reportedly told HispanTV: “We won’t accept low-quality repairs. This is a new lock head and we expect it to work properly. We aim for a lifespan of 100 years.”

In a statement posted on 7 September the Panama Canal Authority (ACP) said it was awaiting a formal report from the main contractor, Grupo Unidos por el Canal (GUPC), following detailed inspections. It said the report would look at the root cause of the problem and recommend the method of repair.

“Upon evaluating the report’s findings, the ACP will assess and communicate if the project’s completion timeline will be altered in any way,” said the ACP statement.

The filling of the Pacific-facing Cocolí Locks began on 22 June in a testing stage that was expected to take about 90 days. The flooding was carried out by a network of electric and diesel pumps, filling the lower chamber at a rate of nine inches per hour.

“This stage of testing is meant to timely detect and correct any deficiencies in the project,” said the ACP statement. “As part of this testing, some water seepage was detected in a specific area of the new Pacific locks in a section that separates the middle chamber and lower chamber, as they were being stress-tested through exposure to level

differentials much higher than those required for normal operations, but that may occur during dry-chamber maintenance works in the future.”

The ACP said it had appointed two independent external structural engineers to look into the reasons for “this localized problem” and assess GUPC’s solution.

“GUPC is obliged to ensure the long-term performance on all aspects of the construction of the locks and to correct this deficiency,” said the ACP statement. “Moreover, GUPC’s contract with the ACP dictates that the group is responsible for modifications and corrections that may be required.”

ENCOURAGED

Meanwhile, the ACP says it is encouraged by overall progress with the project, which is now “93 per cent complete”.

In August, while testing of the new locks continued, the three dams next to the Cocolí Locks were completed. Borinquen dams 1W and 2W, located west of the Cocolí Locks, and 2E, on the eastern side, are constructed of rock particles and a clay core to prevent leakage between the new access channel and Miraflores Lake. Grout injections in the foundation rocks were used to create an impermeable barrier.

The dams are essential to the completion of the new locks project because the water level of the navigation channel of the expanded canal will increase by 9.0 metres.

Other work in progress includes the removal of the ‘plug’ (strip of land) separating the Cocolí Locks from the Pacific Ocean and the culmination of the Pacific Access Channel work. Likewise, the process of removing the equivalent ‘plug’ on the Atlantic side has been initiated.



MARKETS CONTINUE TO RALLY IN ALL SECTORS

By Jan-H. Heikes

CONTAINER MARKET

The charter markets for all segments continued their rallies throughout April, May and June. Compared with March levels, every size category increased its earnings by at least 15 per cent. The star performers were the 1,700 teu and 2,500 teu ships, which managed to elevate their charter rates by over 40 per cent. At the market peak, ships from 1,300 to 2,500 teu all came in at levels around US\$ 12,000. Traditional premiums for Caribbean trading were completely eroded due to steep rate rises in Asia and in the Mediterranean. As a consequence, only two or three ships were being positioned to the Caribbean against long-term charter commitments; but, again, several ships have left the area for drydocking in Asia or Europe.

Since the end of June, worldwide charter rates for sub-panamax containerships have been on retreat. For most standard ships, much of this spring's gains have been eliminated again, with rates dropping by 10 to 20 per cent. With the negative markets, the Caribbean rates, though falling at a slower

pace, proved more resilient compared with the rest of the world. Vessels with distinct technical features, such as a high relative reefer intake (for example, 1,300 teu and 2,500 teu high reefer class) especially favored in Caribbean trades, have maintained their relative advantage. After losing considerably in July and early August, the downward trend in all segments seems to have slowed towards the end of the reporting period.

With the expected completion of the new Panama Canal locks in 2016, allowing vessels up to 14,000 teu to transit the canal, a reorganization of Caribbean and USG-USEC services is likely.

MACROECONOMICS

The current economic figures look rather subdued. The IMF revised GDP growth expectations for the Caribbean in 2015 downward to just 0.5 per cent. Chronically

SELECTED CONTAINER FIXTURES

900-1099 TEU - geared, celled

Apr 15	Georgia 966 TEU / 604@14 / 18on35 / 240rp	5-7 months	US\$	8000	p/d
May 15	Alexia 966 TEU / 604@14 / 18on35 / 252rp	4-5 months relet	US\$	8500	p/d
Jun 15	Vega Scorpio 966 TEU / 604@14 / 17.4on44 / 252rp	5-6 months WCCA/USWC	US\$	9250	p/d
Jul 15	Vega Sagittarius 966 TEU / 604@14 / 18on35 / 252rp	5-7 months	US\$	8250	p/d
Aug 15	Heinrich Sibum 966 TEU / 604@14 / 18on35 / 252rp	1-4 months	US\$	7500	p/d

high public debt, limiting investment potential, remains a major problem for many of the region's nations.

Immediate positive signs are to be found in the low oil price and the present solid economic development in the USA and the EU, the Caribbean's two largest trading partners.

In the medium term, the perspective is further upbeat. China just announced its China and Latin America and Caribbean Countries Cooperation Plan (2015-2019) that aims to increase trade volumes to US\$ 500 billion and investment volumes to US\$ 250 billion. This program might help to counter the lack of internal public investment.

Another potentially positive effect could also arise from the improving relations between Cuba and the USA. So far, strong Cuban GDP growth is attributed mainly to increased tourism activity, but potentially bigger trade volumes are also on the horizon.

But while the low oil prices are pleasing the car industry and other consumers, they are, in fact, a heavy burden for the oil-produc-

SELECTED CONTAINER FIXTURES

FIXTURES under 900 teu - geared / gearless

Apr 15	Stoer Trader 660 teu / 390 @ 14 / 17 on 26 / 75 rp	5-7 months	US\$ 7,500	p/d
May 15	Sina 511 teu / 270 @ 14 / 15.5 on 19 / 84 rp	4-6 months	US\$ 6,750	p/d
Jul 15	Delphinus 603 teu / 350 @ 14 / 17 on 26.5 / 150 rp	3-5 months	US\$ 7,750	p/d
Aug 15	Katharina B 515 teu / 280 @ 14 / 15 on 15 / 75rp gearless	15-18 months	US\$ 5,500	p/d

SELECTED CONTAINER FIXTURES

1,100 teu – geared, celled

Apr 15	Caribbean Voyager 1,118 teu / 700 @ 14 / 19 on 42 / 220 rp	5-7 months	US\$ 8,900	p/d
May 15	Acapulco 1,162 teu / 720 @ 14 / 17 on 31 / 100 rp	10-11 months	US\$ 8,500	p/d
Jun 15	Conrad S 1,118 teu / 700 @ 14 / 19 on 40 / 220 rp	7-9 months	US\$ 8,500	p/d
Jul 15	Tabago Bay 1,118 teu / 696 @ 14 / 19 on 42.2 / 220 rp	30-70 days lower ECSA trade	US\$ 8,500	p/d
Aug 15	Hudson River 1,118 teu / 700 @ 14 / 19 on 42 / 220 rp	4-7 months	US\$ 7,900	p/d



CONTINENT < > COLOMBIA

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ing countries. Ninety-seven per cent of Venezuela's exports are oil, now trading at prices as low as in 2009. Consequently, imports are low, leaving store shelves empty.

SALE AND PURCHASE (CONTAINER)

Activity focused on the larger Caribbean-related vessels. CMA CGM introduced three newbuilding 2,100 teu gyanamax ships to its Europe to NCSA trade network. The vessels will replace three out of six units of 1,700 teu ships that had been purpose-built for the same trade in 2007.

Strong demand for high reefer 2,500 teu ships also manifested itself in the sale and purchase market as Maersk Line bought six such vessels, all fitted with 600 plugs. By this move, Maersk made itself a little more independent from the charter market for these high-end vessels.

REEFER

After a promising season for the bigger tonnage, owners experienced a rude awakening in May and had to face freight rates close to or below running costs. The market then turned very quiet during June and July, due mainly to a lack of spot banana requirements. The present ends of the southern citrus and kiwi fruit seasons will probably prolong the dull market. Operators are not ballasting across the Atlantic to Cristóbal in order to avoid having tonnage piling up in the area.

By the end of August chartering had become a bit more active due to a surplus of bananas on the ECCA. A positive upswing, however, is expected to materialize only in the second half of October and early November when the Spanish and Moroccan citrus as well as the European spud seasons will start.

For the small segment, supply and demand are quite balanced. The summer period did cause rate decreases, but not as significantly as for the larger tonnage. The currency restrictions imposed by Nigeria continue to block the fish trade. As a consequence, business has been driven into neighboring ports, resulting in congestion in some ports. In combination with increased cargo requirements, this development has led to an upward momentum in freight rates. Owners and operators remain very confident for this segment.

SELECTED CONTAINER FIXTURES

1,300 teu – geared, celled

Apr 15	Ranjan 1,341 teu / 925 @ 14 / 20 on 52 / 449rp	10-12 months	US\$ 9,750	p/d
May 15	Warnow Whale 1,296 teu / 957 @ 14 / 19.6 on 45 / 390 rp	8.5-10.5 months	US\$ 12,300	p/d
Jul 15	Magari 1,338 teu / 925 @ 14 / 20 on 52 / 449 rp	4-6 months WCSA trade	US\$ 12,000	p/d

SELECTED CONTAINER FIXTURES

1,700 teu – geared, celled

May 15	Hs Smetana 1,740 teu / 1,278 @14 / 21 on 65 / 298 rp	8-10 months	US\$ 11,500	p/d
Jun 15	Pinara 1,696 teu / 1,300 @ 14 / 20.5 on 60 / 300 rp	10-12 months	US\$ 11,900	p/d
Jul 15	Hansa Freyburg 1,740 teu / 1,330 @ 14 / 21 on 64 / 300 rp	8-10 months	US\$ 11,250	p/d
Aug 15	Rhl Agilitas 1,732 teu / 1,275 @ 14 / 20 on 58 / 379 rp	3-7 months	US\$ 10,150	p/d

SELECTED CONTAINER FIXTURES

2,500 teu - geared, celled

Apr 15	Helene S 2,450 teu / 1,897 @ 14 / 22 on 79 / 400 rp	5-7.9 months	US\$ 11,500	p/d
Jun 15	Wehr Oste 2,526 teu / 1,895 @ 14 / 21.7 on 74 / 481 rp	9-11 months	US\$ 12,600	p/d
Jul 15	Buxlink 2,478 teu / 1,914 @ 14 / 21.5 on 84 / 410 rp	5-8 months	US\$ 10,375	p/d
Aug 15	Tiger 2,524 teu / 1,854 @ 14 / 21 on 82 / 550 rp	11-13 months	US\$ 12,500	p/d

CONTEX

	CONTEX	12 months	12 months	24 months
		1,100	1,700	2,500
Apr-15	531	7,853	9,966	13,107
May-15	564	8,443	11,159	13,884
Jun-15	562	8,554	11,757	13,593
Jul-15	526	8,356	11,381	12,166
Aug-15	487	8,101	10,453	10,770

Rates are average of all reports and worldwide trades

AVERAGE REEFER RATES

	April	May	June	July
class 424.000 cbf	0.76	0.63	0.44	0.40
class 265.000 cbf	1.14	1.15	1.00	0.90

Rates are per cu ft / per 30 days

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HOW INFO TECH CAN PROPEL BUSINESS OPPORTUNITIES

FACT: Businesses invest money in order to make money

BY ADVANTUM

In this, the information age, significant spending on information technology (IT) projects is commonplace. This being said, employing a 'hit and hope' approach to one's major IT investments brings with it a high degree of uncertainty.

Businesses must understand that benefits will not magically appear when a new technology is delivered; it evolves over time and requires commitment. As with any other business process, realizing IT investment benefits requires consistent management.

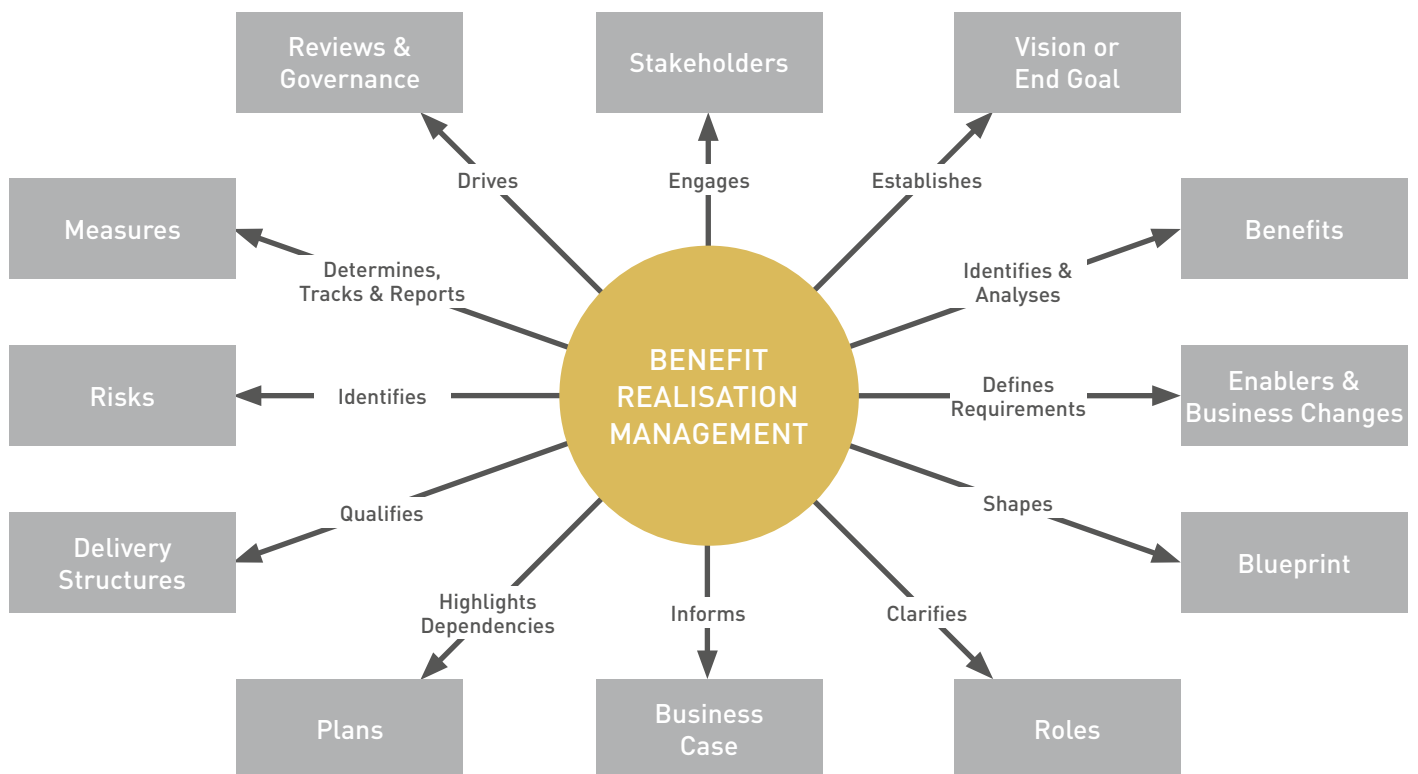
The maritime industry is no different. Will the 'learning lag', as well as difficulty measuring benefits, prevent us from deriving the full benefit of these significant IT investments?

BENEFITS REALIZATION

Gartner, the world's leading IT research and advisory company, defines Benefits Realization as the discipline that organizations adopt to maximize the business value of projects and investments.

Benefits Realization allows senior management to see how specific investments align with the business so they are better able to understand the total impact on the business operations.

Unless today's business experts and IT professionals engage in a mix of understanding how IT can propel business opportunities and results, they will continue to trot with a myopic view of the wonders of 'technology' with little regard for its net contribution to the operations of the organization.



While IT continues to absorb a large chunk of capital investment, it would appear that such investments are not meeting the promise of producing the expected business results as purported by John Thorp in his book 'The Information Paradox: Realizing the Business Benefits of Information Technology'.

In recent times, local and regional IT service providers have quickly migrated to the 'cloud' as a means of cost containment, transfer of risk and accessibility and, ultimately, easier management. Once organizations are comfortable with this form of outsourcing, IT managers will instead manage agreements and contracts rather than local area network, servers, etc.

EASY AS ONE, TWO, THREE

Managers and IT professionals can, should and must drive transformation in their organizations to increase the delivery of promised benefits. According to Ben Chamberlain, they can begin by taking three important steps.

1. SHIFT FOCUS: think benefits v. investments

Recognize that business has to own and control the investment; business owners

must be involved with investment decisions. Investment considerations and systems should measure and demonstrate how projects directly contribute to improving specific business metrics. After all, it's your business that has to own and manage the investment and associated decisions.

2. AVOID FRAGMENTING INVESTMENTS: integrate instead

Assemble a process that facilitates the evaluation and management of your company's investment programs. Use this system to identify what improvements or investments will result in the improvement necessary to meet business objectives. Then improve or apply benefits realization techniques incrementally.

3. AUGMENT CONTROL SYSTEMS: Benefits Realization v. Project Portfolio Management

Extend the investment control mechanism to measure how cost and benefits are impacted by lifecycle project decisions. All organizations have a benefits realization process. What's unfortunate is that it is often a passive process and one that is not man-

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JOHN THORP

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aged. The Benefits Realization Approach provides a clear road map illustrating the paths that lead to beneficial results. This not only tells management how to embark on IT-enabled change, but makes clear the capabilities required to realize those benefits.

It is vital that more companies adopt the Benefits Realization Approach to IT investment to enable improved monitoring and increasing pressure to avoid poor investments and deliver business value. Start using the Benefits Realization Approach today to enhance the value delivery on your investments.

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