

Caribbean MARITIME



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PIRATES OF THE
CARIBBEAN
MODERN-DAY PIRACY

SPECIAL REPORT
TRINIDAD
AND TOBAGO



PROFILE: WILLIAM TATHAM

|

GUYANA

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TII SECURITY

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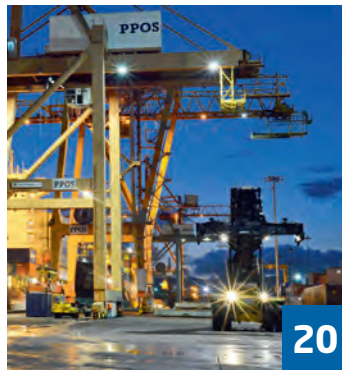
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CONTENTS

- 2 FROM THE CSA PRESIDENT**
Gearing up for a neo-panamax world
- 4 HARBOR VIEW**
- 6 PIRACY**
Pirates of the Caribbean
- 10 BOATSTOPPER**
Braking is better than breaking...
- 12 PROFILE**
William Tatham
- 15 PORT DEVELOPMENT**
Port reform an urgent challenge for us all
- 18 GUYANA**
Muneshwers develops new river terminal
- 20 SPECIAL REPORT: TRINIDAD AND TOBAGO**
 - 20 Port of Port of Spain
 - 23 PLIPDECO
 - 25 Bunkering
 - 26 Shiprepair
 - 29 Ferry service
- 30 OIL SPILL RESPONSE**
Toolbox approach 'can stave off disaster'
- 33 TII SECURITY**
Prevention is better than cure
- 36 PORT BRIEFING**
- 38 STARBOARD BRIEFING**
- 40 CSA DIARY**
Caribbean Shipping Executives' Conference (CSEC) 2016
- 43 RUSSBROKER**
Tough times in chartering sector
- 47 ADVANTUM**
Quality management



David Jean-Marie
President
Caribbean Shipping Association



GEARING UP FOR A NEO-PANAMAX WORLD

The first wave of 8,000 to 10,000 teu 'neo-panamax' vessels started to flow through the widened Panama Canal a few months ago, signalling a new era in shipping and logistics in our hemisphere.

According to reports, within the first month of its opening, the expanded canal welcomed 53 vessels, including 22 liquefied petroleum gas vessels, 28 containerships and two vehicle carriers. The number of reservations that the canal has

received from various types of neo-panamax vessels is growing by the week. This increasing demand is further evidence of the maritime industry's continued trust in the expanded canal and the impact it will have on the future of global maritime trade.

For us in the Caribbean region, not only is it destined to have profound effects on container trade flows, ports and intermodal operations, but it widens the conversation among stakeholders about the strategic adaptive abilities of our

sector, particularly when viewed in tandem with other critical global industry factors.

IMPACT

Individually and as a collective we continue to grapple with the impact of big ship alliances and the resultant network synergies; rapidly evolving technology and the impact of big data, energy and environmental policy, enforcement of global safety standards, cyber security threats and more, all of which promise to have a huge impact

on the survivability of regional port and terminal operations as well as investment opportunities for business growth.

All of this is transpiring in a period of low commodity growth for shippers, with most of the developing world in an economic slowdown. In short, we have a lot to deliberate on and strategically address.

These issues are real and significant and largely beyond the power of any one shipping interest to address. But no one can afford to throw up their hands



How ready are our regional shipping interests to capitalize on a new paradigm where evidence-based decision-making replaces instinct and years of experience? How do maritime companies transform to add value and increase their competitive advantage through development and deployment of technology? Should we be recruiting and training maritime data analysts?

IMPLICATIONS

Shifts in global demographics and population growth rates, coupled with long-term economic growth in developing markets, have implications for the maritime sector over the course of the next decade. According to recent reports, the middle classes, with their sizeable disposable incomes, continue to expand in the emerging economies of Asia, Africa and Latin America. These groups will drive growth in demand for imports of commodities and finished goods. One consequence for the maritime sector of this possible rise in consumer spending in developing markets will be long-term growth opportunities for container shipping.

In their logistics operations, networks and fleet activities, regional shipping interests have opportunities to improve performance. Companies must find, test and invest in new products and services, modern organizational and business models, technology and the digitization of key operational processes in order to evolve with the rest of the world. It is not too far-fetched to imagine that, within

three years, new technology start-ups can develop a data-based understanding of cargo flows. Already, new IT-enabled businesses are making inroads into logistics and freight forwarding markets; others aim to automate processes for ocean freight booking and invoicing.

the future. Those that embrace change will be better prepared than their rivals to make the best of the current business cycle and to thrive in the next one. To attract the next generation of maritime professionals, our pool of labor must become more technologically advanced

How ready are our regional shipping interests to capitalize on a new paradigm where evidence-based decision-making replaces instinct and years of experience?



and accept their fate. Opportunities yet exist if we accept, adapt, innovate and advance.

Most of us will be able to benefit from better business forecasts and greater predictability of market and pricing trends occasioned by the increasing availability of shipping data and advances in big data analytics. More and larger containerships will require investment in ports, infrastructure, technology and services to ensure that the flow of business remains efficient.

In anticipation, leading carriers are investing in devices and software to track containers in real time. To accelerate the technology development and adoption, government and private sectors need to work together to drive the changes and ensure the smooth transition of new innovative methods.

We recognise that our human capital must also grow and evolve. Companies need to find ways to help employees embrace new ways of working and must be prepared to bet on

and innovative and must learn new skills and integrate new technology.

By the time you receive this issue of 'Caribbean Maritime' we will be enjoying the hospitality of Trinidad and Tobago members of our association at the 46th Annual General Meeting, Conference and Exhibition. I am certain that the issues raised here will expand with the requisite attention and discourse of all the participants. I look forward to robust and productive dialog during the conference.

HARBOR VIEW



PORT OF PORT OF SPAIN

As a direct result of a slowdown in the energy-based local economy, the Port of Port of Spain is facing a drop in container throughput in 2016. On the plus side, the port is dramatically improving its productivity – a situation that can be further enhanced once a decision is made about new cranes and equipment.



PIRATES OF THE CARIBBEAN

William Lusk shines a light on the threat of maritime piracy and armed robbery in the Caribbean

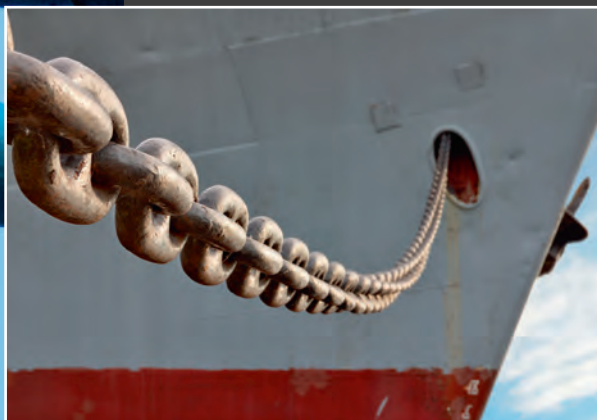
It's no secret that shipping and port authorities across the Caribbean are constantly faced by threats to their safety and security, ranging from hurricanes and oil spills to theft and smuggling. Two such issues, long regarded as mere anachronisms, are maritime piracy and armed robbery. Although rare in occurrence, the threat is very real.



On 16 August 2015 an officer on routine rounds on board an anchored general cargo ship near Barcelona, Venezuela, noticed three store rooms opened and their padlocks broken. According to a report published by the International Chamber of Commerce's International Maritime Bureau (IMB), a non-governmental organization which runs a global piracy reporting center, he immediately raised the alarm and the crew mustered. It was noticed that the robbers had boarded the ship via the anchor chain, stolen ship's properties and escaped.

Another day, 12 May this year, yielded a similar situation at a nearby anchorage close to Barcelona. Four robbers armed with steel pipes boarded an LPG tanker at an anchorage off Barcelona. The crew on routine rounds spotted the robbers and raised the alarm. Seeing the alerted crew, the robbers escaped. A search was carried out by the crew and the ship's stores were reported stolen.

On 17 July this year robbers in a small boat boarded an anchored product tanker off Port-au-Prince, Haiti. Duty crew onboard on routine rounds noticed the robbers. The alarm was raised and the crew mustered. Seeing the crew alertness, the robbers jumped overboard and escaped empty-handed.



By William Lusk
Program Manager,
O.C.E.A.N.S. LLC*

Forty-five attacks in the Caribbean were reported to the IMB between 2011 and 2015 (Colombia, Costa Rica, Dominican Republic, Guyana, Haiti and Venezuela combined). As of July this year, five incidents in the Caribbean have been reported to the IMB – twice off Venezuela and once each off Haiti, Colombia and Guyana. According to security expert Mark Gauouette, it is believed that incidents involving pirates and armed robbers are underreported and that reported figures can be increased by up to 30 per cent to more accurately reflect reality. Despite this voluntary bias, the IMB remains the most comprehensive and authoritative assessment of reported maritime piracy and armed robbery available.

WHAT'S THE DIFFERENCE BETWEEN PIRACY, ARMED ROBBERY AND TERRORISM?

The Greek historian Plutarch, around the year 100 AD, gave the world its first definition of piracy as "those who attack on sea and coastal land without legal authority". In a modern context, the actions of pirates, armed robbers and terrorists can be nearly identical – essentially using the threat of violence to achieve a goal – but motivation and location of the attacks determine how to classify the incident.

The most binding legal definition of piracy is the one offered by the United Nations Law of the Sea Convention and used by the International Maritime Organization (IMO). It cites piracy as: "Any illegal acts of violence or detention...committed for private ends by the crew or passengers of a private ship... against another ship...in a place outside the jurisdiction of any state."

Special emphasis needs to be placed on the words “private ends”, as they serve as the key differentiator between pirates and terrorists – the latter of whom would instead engage in these acts for political ends.

Also critical to note in the UN Law of the Sea Convention definition are the words “outside the jurisdiction of any state”. These words serve to differentiate between pirates and armed robbers. Although their means and motivations of theft are often the same, armed robbers commit their acts within a sovereign country’s territorial waters instead of international open waters like pirates.

GENERAL TRENDS

Examining IMB piracy and armed robbery reports in 2015 and 2016, there have been a number of commonalities among incidents in the Caribbean region which help us understand the threat:

1) Incidents in the Caribbean region occur while a vessel is anchored, not while berthed or steaming. We can draw several conclusions from this fact:

a. The IMB does not differentiate between a pirate attack and an armed robbery, likely because their actions of theft for private gain are the same. If the IMO definition of piracy is applied, every incident in the Caribbean is considered armed robbery rather than piracy. This is because such attacks occur at anchorages within a country’s territorial waters.

b. Vessels are most at risk of unauthorized boardings while at offshore anchorages. Vessel security is enhanced by port security assets while berthed. Without port security assets at anchorages, vessels must fend for themselves and are thus vulnerable to crimes of opportunity.

2) Incidents in the Caribbean region result in unauthorized boardings, not hijackings. Unlike their counterparts in Asia and Africa, attackers in the Caribbean are looking for small payouts rather than multi-million-dollar ransoms after a hijacking.

3) In the Caribbean there has been no reported violence to crew. Although armed, usually with knives or guns or both, attackers are quick to flee once discovered and do not usually resist or retaliate, based on IMB reports.

4) The IMB tracks both attempted and actual attacks in the Caribbean. In 2015 and 2016 there have been no reported attempted attacks in the Caribbean. There are two possible explanations why there are several actual attacks and no attempted attacks:

a. Vessel masters may choose not to report attempted or thwarted boardings since no damage or loss to the vessel was sustained; or

b. Intruders have a 100 per cent success rate and all attempts to board a vessel work. Unauthorized persons are not detected until they are actually on board the vessel. Many reports of attacks in the Caribbean cite that the armed robbers are only caught by crew on routine rounds once on board.

‘Amandala’, which bills itself as the largest circulation newspaper in Belize, has occasionally written about ‘pirate attacks’ against yachts anchored offshore.

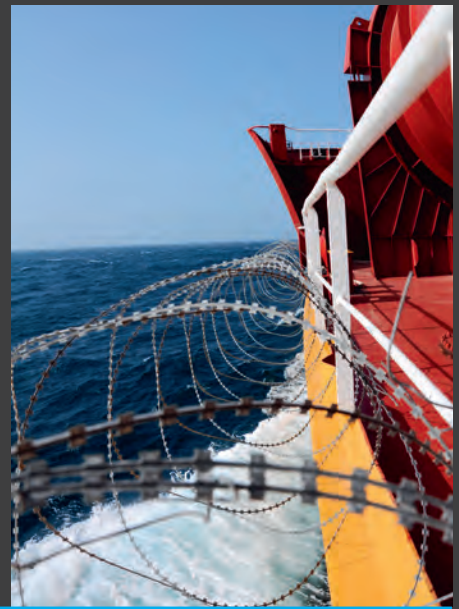
In January this year, for example, ‘Amandala’ reported that a group of American tourists anchored near Middle Long Caye were attacked by pirates and had several personal possessions, electronics and an outboard motor stolen. However, since this particular incident occurred in Belizean waters, the IMO would likely instead classify the incident as armed robbery.

Yachts and pleasure craft, although rare, are much more susceptible to armed robbery in the Caribbean than larger commercial SOLAS vessels. Not only are private vessels easier to board and/or steal, but they are far more likely to contain personal effects which can be resold at a high value. Unfortunately, there is no common and authoritative resource which compiles and tracks quantitative data on incidents against yachts in the Caribbean.

LOW LIKELIHOOD, HIGH CONSEQUENCE

Regardless of victim (commercial vessel or pleasure boater) and location (inside or outside the jurisdiction of a country’s waters), maritime piracy and armed robbery in the modern Caribbean are currently unlikely yet potentially high consequence events.

However, the Caribbean maritime



The relative ease with which armed robbers board an anchored vessel without detection – and their statistical success – is a cause for alarm

community would be mistaken to assume that this pattern will continue into the future. The likelihood of armed robbery may increase in the territorial waters of countries currently experiencing political instability in the region.

The relative ease with which armed robbers board an anchored vessel without detection – and their statistical success – is a cause for alarm. It is very possible that this weakness can be exploited by even more dangerous unauthorized boarders. It is the responsibility of each vessel crew, augmented by local port authority resources, to prevent itself becoming yet another maritime armed robbery statistic.

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BOATSTOPPER

BRAKING IS BETTER THAN BREAKING...

How does a law enforcement officer stop a speeding boat without resorting to life-endangering force? A Florida-based company has come up with an ingenious solution that has now been installed in the Port of Tampa. Gary Gimson reports.

Many port authorities and coast guard agencies are faced with a dilemma: how to stop or intercept non-compliant craft within their jurisdictions without endangering lives – not only those on board the craft but, more importantly, among the general boating public.

Well, one Florida-based company, Maritime Arresting Technologies (MAT), of St Petersburg, believes it has the perfect answer. This company is the inventor and local manufacturer of a device called the Boatstopper. One of MAT's leading lights is quirky British designer and chief technology officer Matthew Searle, who spoke to Caribbean Maritime about his pet project.



“Many methods have been tried to stop boats – ramming the engines off, shooting the engines, using entanglement nets – but all of these are problematic,” said Mr Searle.

LETHAL

And he explained why: “Ramming and shooting are extremely difficult, even with highly trained operators. Both are considered to be use of lethal force. Entanglement nets, meanwhile, need time to settle and result in broken drive trains, meaning a disabled vessel to tow to safety – and no resale value on the engines. Another issue with entanglement systems is that their

bulk means that only short sections can be deployed using a hand-held launcher.”

The Boatstopper was developed as an alternative non-lethal means of stopping non-compliant boats. Current techniques go from one extreme to another, where verbal commands are followed by use of deadly force. The Boatstopper offers a unique interim level of force whereby the situation can literally be de-energised, with the non-compliant boat being brought down “off the plane” and slowed to walking pace.

The Mk 4 Launcher and Boatstopper payload were designed in-house by MAT. The Mk 4 Launcher is held in a unique launch position, being clutched to the chest. This allows the user to brace himself or herself on a moving boat or to shoot from a seated position. Elevation is provided automatically by the grip, the user only needing to aim in a lateral plane.

The first Boatstopper prototypes were made in summer 2015 and followed on from a series of wooden models that helped to refine the overall layout and positioning of the controls. It was found that keeping the mass close to the user was critical for use in heavy seas. The launcher has been refined over a 12-month period into today’s Mk 4 Launcher.

The Boatstopper payload and other similar and associated products – such as Lifeline, a 100 yard shot line, and Cavitator, a jet ski disabler – have also been developed over the past year or so.

The Boatstopper actually consists of two drogues connected by 40 yards of ultra-high molecular weight polyethylene (UHMWPE)

The Boatstopper was developed as an alternative non-lethal means of stopping non-compliant boats

rope with a breaking strain of 8,000 lb. The payload is packed into a vinyl sleeve for deployment. At the end of the flight phase the vinyl sleeve releases the far drogue. The system works exactly like the arresting gear on an aircraft carrier, catching the boat’s lower unit and pulling the boat off its plane. In essence, it’s a spike strip for the water, but inflicts no damage on the target vessel.

MAT’s Lifeline device, meanwhile, consists of 50 yards of UHMWPE rope with an auto-inflating collar. The Lifeline is useful for fast water rescue, surf rescue, ice rescue and any other occasions where someone needs to be rescued, but without putting the rescuer in danger.

PROTECTION

Funded by a Department of Homeland Security grant, the Port of Tampa has been the initial customer of Boatstopper. The Florida port has bought four launchers for the Hillsborough County Sheriff’s Office and for use in port protection. Other county sheriff’s offices are said to be looking at purchasing this year.

Each Boatstopper unit costs US\$ 6,800. For this, the purchaser gets a Mk 4 Launcher in a fabric carrying case with a charging line and two payloads, typically one Boatstopper and one Lifeline. The only other equipment needed is a full scuba tank. The system is effectively free to own. The payloads are fully reusable with the exception of the Cavitator. The Mk 4 can also deploy a 100 yard shot line and 300 Cavitators that disable jet-driven personal water craft.

Basic training in the use of Boatstopper is provided by MAT; but the National Association of State Boating Law Administrators (NASBLA) can include training on the Mk 4 as part of its well established Pursuit and Stop Course.

The proof of the pudding, however, is in the eating. So has any Boatstopper been successfully used in a live situation? “Not yet,” said Mr Searle. “But we hope it will be soon.”



SECURITY PACKAGE

MAT and another St Petersburg-based company, SRT Supply, jointly delivered a security package to Port of Tampa including the boat-stopping systems and reel-mounted security booms. The innovative reel-mounted booms can close off the mouth of a dock in six minutes, providing protection from threats. When not in use they are easily stored on land. MAT’s security booms can be combined with containment booms to provide a multi-layer defense against environmental and security threats.

The man behind Jamaica's cruise success



He would not make such a claim himself, but if there is one man behind the runaway success of Jamaica as a cruise destination then that man is William Tatham.

Mr Tatham answers questions from Caribbean Maritime about his life, his genuine passion for Jamaica and its key position in the region's cruise industry.

Q: Where were you born and where did you go to school?

A: I was born in Mandeville, Jamaica which is located in the center of the island about 2,000 ft above sea level. Most of my schooling was in Mandeville at Belair School – an institution founded and funded by the alumina companies headquartered in Mandeville. I then graduated from university school at Nova Southeastern University (NSU) in Fort Lauderdale.

Q: Did you have a clear idea when you were growing up of what career you might choose?

A: Like all kids I thought I knew what I wanted to do and for many years it was to work in the world of movies, behind the camera in the area of production. In pursuit of that I worked on a number of movies and a television show between graduating high school and going to university. It did not take long for me to realize that this was not what I really wanted to do.

Q: Where did you go to university?

A: I attended Florida International University in Miami and graduated in 1984 with a degree in history.

Q: What was the course of your career up to when you joined the Port Authority of Jamaica?

A: Prior to the PAJ I had worked for Sandals Resorts in the company's sales and marketing department, for Sun Island Jamaica (a leisure wear company) and the Jamaica Tourist Board as the director of cruise shipping for Jamaica. It was while I was at the JTB that I saw that the rightful home for cruise should be with the Port Authority and lobbied the government to move the position over to the PAJ.

Q: How long have you been with the PAJ?

A: I joined the Port Authority in 2002 and while technically the position has remained constant, the area of responsibility has expanded substantially. When I initially

joined the PAJ it was primarily to do all of the cruise-related marketing, but over the years the position has expanded to include port development.

Q: How has the cruise business developed and expanded over the years that you have been involved?

A: I joined the JTB in 1998 and in that year cruise passenger arrivals were around 670,000. Last year, 2015, was a record for Jamaica with over 1,560,000 passengers.

Q: What have been the unique selling points for Jamaica's north coast ports?

A: Jamaica can offer a greater variety of things to do within one hour of its ports than any other destination in the region. This can be cultural, spiritual, historical or just natural.

Q: The size and design of cruise ships has changed in a profound way in recent years. How much of a challenge has this been to



Caribbean Cruises as a partner, we developed the historic port of Falmouth, which has succeeded beyond all our expectations.

Q: What has been your strategy in terms of allowing each of Jamaica's four main cruise ports to play to its strength?

A: This is still a work in progress. We have successfully branded Falmouth and Ocho Rios but are still working on the other two ports.

Q: The rebranding of Falmouth as a special 'historic Jamaica' experience has been a project dear to your heart. How did the idea come about?

A: When we were developing Falmouth we recognized that we were dealing with an unknown. The industry and the regular cruiser knew our two main ports of Montego Bay and Ocho Rios, but not Falmouth. We needed to get the message across that Falmouth was something different yet just as special as the other ports and as it is one of the most historical towns in the region it was easy to focus on that as its strength.

Q: There are plans for a cruise terminal at Port Royal near Kingston. Has any firm decision been made about this project?

A: No final decisions on this just yet. The Port Authority is very supportive of seeing cruise shipping return to Port Royal/ Kingston but not at the expense of its other ports. It has its challenges but we think this area has much to offer and are committed to building the pier once the demand is there.

Q: How has a significant rise in the number of cruise ships being home-ported in Jamaica been achieved?

A: With a nearby world-class airport (MBJ) we always felt that Montego Bay had the potential of being a major Caribbean home port. As such, in 2009 while we were working on Falmouth we started to look seriously at this side of the business. We identified those cruise lines that we felt

might be interested and we began to target them aggressively.

Q: Can you give us an idea of what your job as vice president of cruise shipping entails over the course of the year?

A: From the marketing side I almost always participate in the major cruise shows (Seatrade, FCCA, etc). In addition to this I find real value in engaging the lines in one-on-one meetings. This is very important not only in developing new business but also in maintaining our existing business. Beyond the marketing I spend a lot of time on the ground visiting the ports and working with management teams there to ensure that we are delivering the right levels of services and product.



Q: What of your home life and leisure time?

A: I keep my home life very separate from my work life. I think that it is important to have this balance. While I am not always successful, I do not want to be thinking about work when I am trying to be focused on my family. I also play a little tennis. But the best way to get away from the pressures of the job is to turn off the phone and email and spend time with the family.

In September, Tourism Minister Hon Edmund Bartlett appointed William Tatham to Jamaica's newly formed and 13-member National Cruise Council.

The NSC is charged with monitoring global cruise shipping trends and strategically safeguarding relationships with cruiseship operators while enhancing the experience of passengers visiting Jamaica.

Jamaica's cruise ports?

A: It has been a challenge. However, Jamaica has been at the forefront of engaging the cruise operators and working with them to ensure the ports could manage the next generation of ships. When I first joined the JTB the 'Grand Princess' had just been launched, at the time the largest cruise vessel in the world, and very quickly we saw this followed by the 'Voyager of the Seas' and then the 'Freedom of the Seas'. We were able to accommodate all of these vessels at our two main ports. But when the 'Oasis of the Seas' was announced we knew there had to be a new approach and, with Royal

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PORT REFORM

AN URGENT CHALLENGE FOR US ALL

There have been three notable tipping points in the history of port development.

Two of these were related to customs law and excise taxes and they occurred many years apart, in the early 13th century and in the opening years of the 19th century. They set the pattern for modern-day seaports in terms of berths, warehouses and the separate roles of ship's crew, stevedores, shipping agents and customs authorities.

The third tipping point occurred much more recently, in 1991, and in this article* I would like to focus on that event – the eighth session of the United Nations Conference on Trade and Development (Unctad) in Colombia that resulted in the Cartagena Commitment. It had a major impact not only on port development but on liner shipping as a whole. The complete logistics shipping chain was altered forever.

The Cartagena session concluded that protectionism had failed to meet objectives such as improved quality of life in developing countries. The irony is that Unctad for

many years supported governments in developing countries that had a policy of protectionism whereby the state had an active role in production and in ports and ocean transportation.

In 1991 it was concluded that protectionism had failed and a new policy was needed to eradicate poverty and achieve a more equal distribution of the world's wealth. This led to the Marrakesh Agreement and the setting up of the World Trade Organization to develop and apply a new policy.

PARTNERSHIP

The new policy was liberalization, privatization and greater private-sector involvement. Partnership between the public and private sectors was to be promoted and governments were to facilitate the private sector.

Very early after being established, the WTO in 1993 introduced the Intermodal Surface Transportation Act in which it strongly appealed to all governments to make an inventory of the conditions of their ports and the accessibility to these ports by land and water. It was strongly recommended to improve these infrastructural

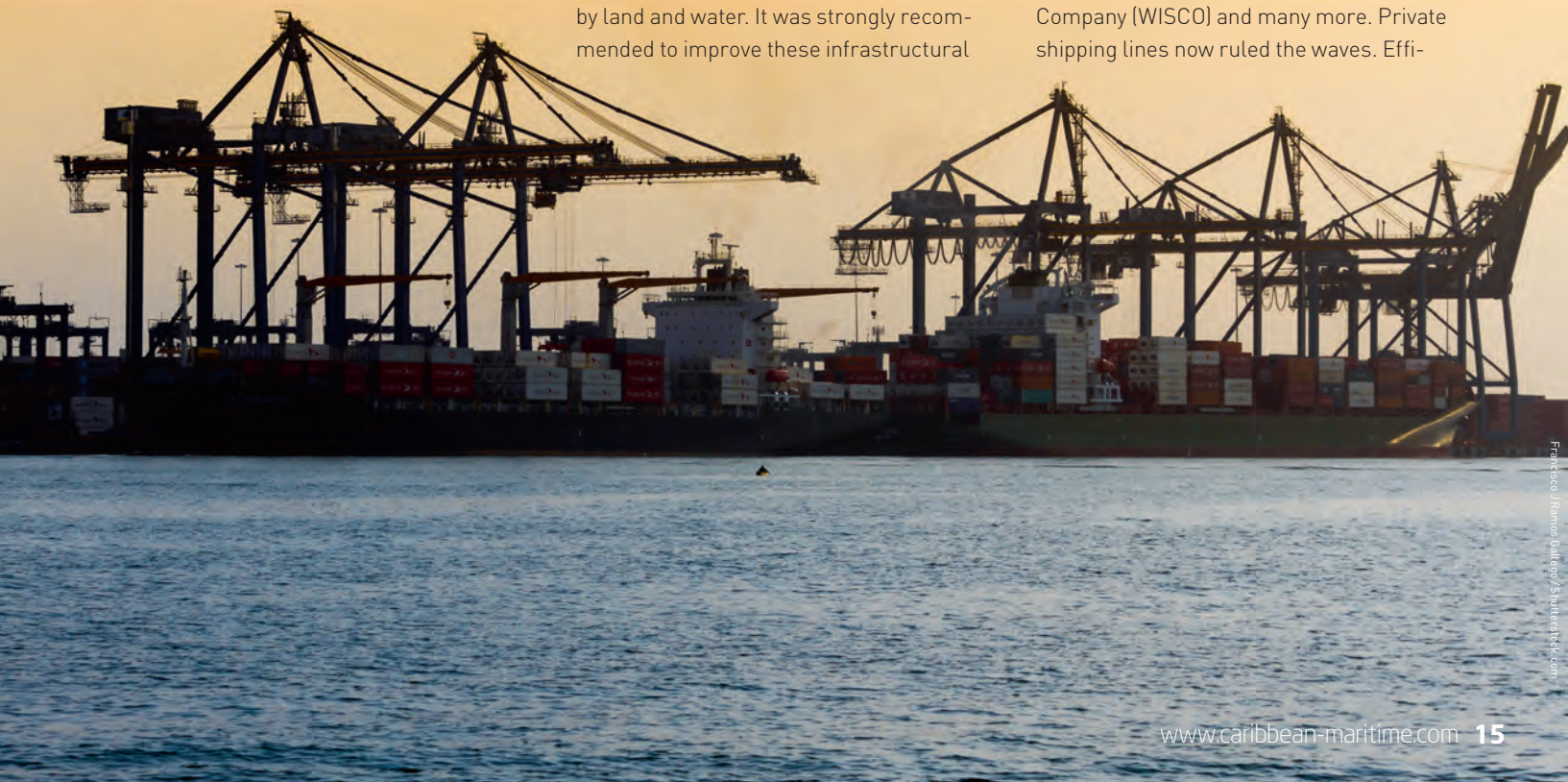


By Remy G.A. Vyzelman

Captain Vyzelman is president and CEO of Integra Marine and Freight Services. And chairman of the Supervisory Board of Integra Port Services

works and port efficiency.

Whether by design or default, the replacement of protectionism by liberalization and privatization had a cascading effect. In Europe, the European Union introduced legislation to comply with the new policy of liberalization and privatization. European state-owned shipping companies were also privatized. The old French state-owned company CGM was privatized and sold to CMA, and so on. The new policy also had a domino effect. It led to the demise of state-owned shipping lines, sometimes by default. The once mighty Flota Mercante Grancolombiana disappeared, as did Lloyd Brasileiro, the Venezuela state-owned shipping line, the West Indies Shipping Company (WISCO) and many more. Private shipping lines now ruled the waves. Effi-





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PORT DEVELOPMENT

ciency and customer service became the name of the game.

Global institutions introduced port reform policies to increase the private sector's role in ports and to finance improvement of ports and the accessibilities to these ports.

It is a myth that one private-sector terminal operator is a monopoly that may abuse its position

In South America, Colombia was one of the first countries to really privatize its ports. Panama also understood the new policy. Other territories in the region were slower to improve efficiency and modernization of their ports.

LOOKING AHEAD

So where do we go from here? What will be the future role of customs authorities in ports, given that with single markets and the lifting of customs duties within these markets a new role for customs authority is imminent? Also, since value-added taxes replaced part of the income from import duties, how fast can governments keep up with these new developments? What about governments that have not yet understood the importance of increased private-sector involvement in ports and still feel protective? Their ports still suffer from inefficiency and labor problems. What about governments that have not yet modernized their customs legislations? And others who still have not understood the many programs of trade facilitation as promoted by many global institutions?

In certain countries, customs will not accept vessel sharing between lines and still have the old-fashioned idea that a vessel cannot carry cargo for two lines. They don't realize that the captain can transfer the responsibility of the cargo in temporary storage to two agents.

I realize that small territories with a limited annual cargo throughput need to apply things with more diligence. But that does not mean that they could not update their legislation and transform their customs to

be more efficient and effective while at the same time truly applying trade facilitation.

It is a myth that one private-sector terminal operator is a monopoly that may abuse its position. There are ways and procedures to prevent that from happening, such as a regulated tariff and the requirements of key performance indicators. Terminal operators and public terminals that serve the domestic cargo should understand they are a public service franchise, with all the social responsibilities that go with that.

HOW CSA CAN HELP

I think the CSA can play a role in making governments aware of the new policies of liberalization and privatization and the importance of implementing these policies. In order for any territory to demand its share of the world's wealth, the port as a gateway to world trade is of high importance.

Unctad in the past often had presentations during CSA meetings. I think the CSA should once again invite them to

make presentations because they maintain valuable statistics and write high-quality analysis with regard to trade, port and ocean transportation.

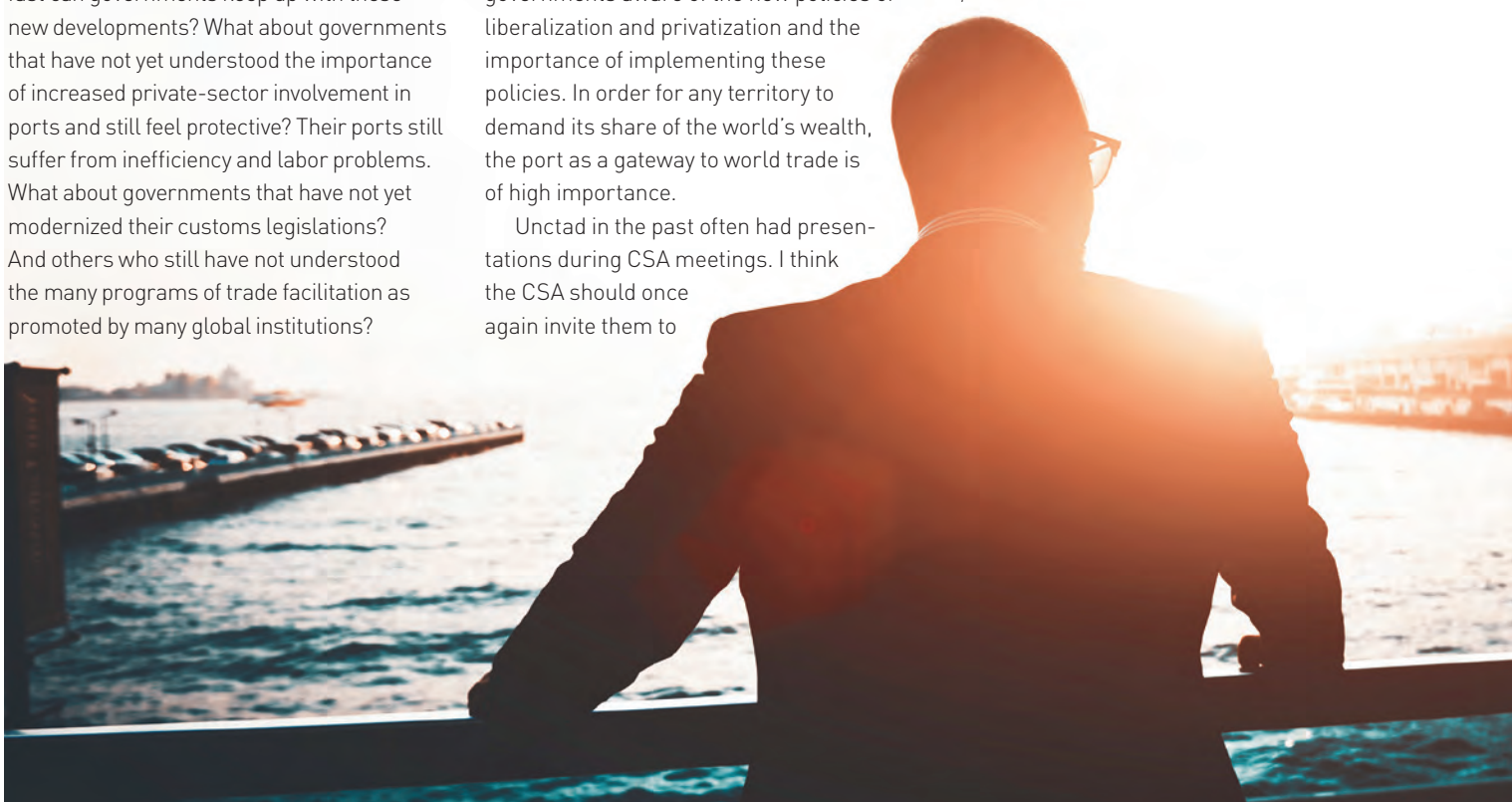
The same goes for the World Bank, which on its website has a chapter for port reform (Port Reform Toolkit). We should invite top customs officials from countries that have modernized their legislation to come and educate us with presentations. How do we get governments and politicians to understand the importance and consequences of the Cartagena Commitment to eradicate poverty in the world and have a better distribution of quality of life by facilitating the private sector as an engine of economic development?

I realize it is a challenge to get governments, and especially politicians, to understand the importance of port development.

Reminding them of the Cartagena Commitment and the fact that landlord ports have a proven track record of being the most efficient terminals will help to realize the required paradigm shift.

We as captains of industry have a job to do.

**R.G.A. Vyzelman has described all three tipping points in a presentation entitled 'Port development in a historic perspective'. We hope to cover the other points in a future edition of Caribbean Maritime.*



MUNESHWERS DEVELOPS NEW RIVER TERMINAL

The Guyana company Muneshwers Ltd is completing the first phase a new terminal on the east bank of the Demerara River. The new facility will be able to accommodate vessels up to 275 meters in length and will be aimed primarily at customers in the container and offshore oil and gas sectors.

Known as Muneshwers Port 2 to distinguish it from the company's existing facility at Water Street in Georgetown (Port 1), the terminal is being built on 28 acres and is expected to cost the family-owned business around US\$ 50 million to develop over the next five years.

In May 2014 Muneshwers bought the land just outside Georgetown for US\$ 20 million from the defunct forestry business Carib-bean Resources with the aim of developing

the site into the company's second port. The purchase was propitious as this was the last major piece of river-facing land available close to Georgetown. The site is more than twice the size of any existing terminal on the Demerara River.

Managing director Robin Muneshwer said: "The first phase is to activate a small portion of the compound, around four acres, as an inland container yard to handle delivery and receipt of full container loads. It is expected to be completed at the end of October. The second phase is the activation of the quay."

The approximate dimensions of the property comprise a 275 meter water frontage. The terminal is around 500 meters from the River to the roadway. Using the 275 meters Muneshwers has built a jetty and a quay of

90 meters in length. The jetty and quay are built entirely of prestressed concrete.

The second phase will involve dredging the berth to a depth of 6.5 meters at low tide and should be completed by March 2017.

The third phase will be the development of a pipe lay-down yard of about eight acres and reclamation of one acre of land to link the quay with the yard as one contiguous area. This is expected to be completed in October 2017. This phase is more specific in its purpose and in its configuration for the oil industry and will involve a mud, cement and powder plant, fuel depots and warehousing in the later stages of development.

FUTURE PLANS

Muneshwers plans to move four reach stackers / top lifters from Port 1 to Port 2. Two of these will be deployed to the second port on completion of Phase 1 to handle full container loads. In addition, there are two fork-lift trucks of 16 tons and 9 tons that are used to handle empty containers at the facility.

Muneshwers is a long-standing agent for Maersk/SeaLand and a key element of the Port 2 project is for the world's largest car-





rier to move to the new facility in 2018.

Over the longer term, Mr Muneshwer is looking to attract others to use Port 2. He says people in a variety of activities beyond container handling and offshore support – such as rice export, cement bagging and seafood processing – have shown interest.

ABOUT THE COMPANY

Muneshwers Ltd is a private, family-owned company now in its third generation. The company began in 1945 as a hardware importer and distributor.

Some 70 years later, Muneshwers is one of the largest and most diversified companies in Guyana. It owns and operates one of the leading hardware stores, the number one travel agency and one of Guyana's most successful port and agency operations.

In 2014 Muneshwers made a strategic decision to acquire 28 acres of waterfront property at Houston, East Bank Demerara, with the stated purpose of developing the area both as a container port and as a shore-based support for the nascent oil and gas industry.

Muneshwers Shipping has been agent for Maersk/SeaLand since 1998.



TRINIDAD AND TOBAGO



After an absence of eight years, Port of Spain is once again the venue for this year's Caribbean Shipping Association AGM. To coincide with the meeting, Caribbean Maritime is taking a close look at key aspects of Trinidad and Tobago's vitally important maritime sector.

20	Port of Port of Spain	26	Shiprepair
23	PLIPDECO	29	Ferry Service
25	Bunkering		

TRINIDAD AND TOBAGO PORT OF PORT OF SPAIN

Improved productivity brings results

There's good and bad news for the Port of Port of Spain (PPOS). The good news is that, after many years of trying to improve productivity, there is now very real evidence that measures designed to speed up cargo flows are finally working.

And the bad news? Well, despite the growing efficiency of PPOS, there has been a disappointing drop in the volume of cargo being handled by the Port of Port of Spain over the past two or three years.

In 2014 the port handled 385,892 teu, but this fell to 298,686 teu in 2015 and, working on early estimates, it is set to slip to around 257,000 teu this year.

But these figures are probably more a reflection of the overall performance of Trinidad and Tobago's energy-based economy

than the success or otherwise of PPOS.

So, concentrating on the upside, PPOS is really getting to grips with its previously less-than-stellar productivity – a long-term gripe among carriers using the port. Container moves were 17.5 an hour in 2014, improving to 21.7 in 2015 and on target at 26.2 berth moves per hour this year. The port told Caribbean Maritime that 30 berth moves per hour was an immediate aim.

EQUIPMENT

It's safe to say that new additional equipment will be needed if the port is to continue to make significant productivity gains and this has been under discussion for some considerable time. The PPOS is believed to be keen to acquire a new ship-to-shore

crane and 25 tractor trucks and hopes to make a decision in the very near future.

As with many state-owned organisations, however, investment decisions can be difficult at a time when governments have other calls on public spending. Privatization of the Port of Port of Spain could solve this problem, which has been discussed on many occasions over the years although the talks have come to nothing. In any case, it's a political hot potato, with local trade unions vehemently opposed to any sell-off or private-sector involvement.

"There have been talks in the past of a public-private partnership," a management spokesperson told Caribbean Maritime. "But this does not seem to be on the cards at present."

As elsewhere in the Caribbean, the



impact of the Panama Canal's enlargement has still to be fully appreciated and understood – both positively and negatively – in Port of Spain.

PPOS has clearly weighed up the pros and cons and has made a decision about where it wishes to position Port of Spain, saying on the one hand: "The positive impact is that it provides an opportunity for increased business through the handling of transshipment as a hub or sub-hub and the added value of logistical services such as distribution, repackaging, relabeling and other similar activities."

On the other, PPOS conceded: "If the port

As elsewhere in the Caribbean, the impact of the Panama Canal's enlargement has still to be fully appreciated and understood – both positively and negatively – in Port of Spain

is not prepared for expansion, whereby it is unable to accommodate neo-panamax vessels, then the port will miss the opportunity to handle transshipment cargo."

PPOS REVIEW

PPOS is not in a position to take advantage of the canal expansion and could be on the negative side of the impact. Before the expansion, PPOS was in a position to handle the largest container vessels transiting the canal. With the expansion, vessels on the Asia-Caribbean route will not be able to be accommodated at PPOS and this could have a possible negative impact on transshipment business.

However, given the competition among Caribbean ports to secure calls from these larger ships and the money that needs to be invested in the facilities to do so, it may indeed be a wise decision to let this particular zeitgeist pass PPOS by.

CRUISE SECTOR BECKONS

In addition to the cargo handling unit of the Port of Port of Spain, the Port Authority has a unit that operates a cruise ship facility. It has carved an interesting niche for itself in the cruise sector by offering something a little different from the average Caribbean island destination. As PATT explained to Caribbean Maritime: "Our goal is always to increase cruise ship calls to both islands. MSC Cruises is expected to be the main cruise operator calling at Port of Spain next season."



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ENERGY
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WÄRTSILÄ



Outlook positive as Port and Estate turns 50



It's one of the Caribbean's most successful industrial complexes and it has just celebrated its 50th Anniversary.

And we can thank the considerable foresight of a small group of San Fernando-based business people from the South Trinidad Chamber of Industry & Commerce for what is now known as the Point Lisas Industrial Port Development Corporation (PLIPDECO).

Today, PLIPDECO is a public company owned 51 per cent by the Government of Trinidad and Tobago and 49 per cent by private shareholders. The value of the Point Lisas Industrial Estate to the local economy is said to be around TT\$ 35 billion a year – or some 20 per cent of total GDP.

PLIPDECO has two core activities: industrial estate management and port management and operations, including cargo handling. The Corporation is the owner and landlord of the 860-hectare Point Lisas Industrial Estate. The Estate is home to over 100 tenants, including those operating methanol, ammonia, urea, power and steel plants, as well as a number of light manufacturing and service companies.

As a cargo port, Point Lisas comprises six general cargo and container berths. The facility handles a variety of cargo including containerized, breakbulk, lumber, paper, consumables, dry bulk and steel.

In 2015 the port handled 221,836 teus

and a further 312,757 tonnes of general cargo. As elsewhere in Trinidad and Tobago, Point Lisas has seen a recent decline in its container handling due to a slowdown in economic activity and expects a lower performance when 2016 figures are posted.

IMPACT

PLIPDECO's management had this to say to Caribbean Maritime about the closure: "The impact on PLIPDECO has so far been felt as a result of the significant reduction in exports of steel products. The impact on the wider economy would have been felt through the loss of hundreds of jobs directly at ArcelorMittal and indirectly through contractors who are no longer required to provide their services and businesses that depend on ArcelorMittal's products for the manufacture of downstream items. The economy would have also been affected due to reduced taxation revenue from ArcelorMittal."

Several months later, the uncertainty remains as to whether the plant will ever reopen. PLIPDECO told Caribbean Maritime: "The operation is in liquidation and at this point it is too early to tell whether the plant would be sold to another operator and operations will recommence or whether the site would be given up for another type of operation."

As one door closes, others are bound

to open. PLIPDECO is, of course, always looking for new tenants and there is positive news on the horizon with those in the energy sector related to logistics said to be showing strong interest in Point Lisas as a location.

It has been in the pipeline for some time; and plans to further develop and expand the port are still being considered. As the Corporation told Caribbean Maritime: "Conceptual designs are being finalised prior to presentation and approval from the relevant authorities." Once approved, this expansion project will no doubt herald a second half century of success for PLIPDECO.

PLIPDECO celebrated its 50th anniversary on 16th September 2016. Clearly, the port and its industrial complex have come a long way since 1966 and this was highlighted on the day.

Among the activities to celebrate the anniversary include:

- An Interfaith Thanksgiving service for staff on 16 September
- The publication of an anniversary edition of the PLIPDECO Handbook
- A series of advertisements in the mass media including a newspaper supplement where stakeholders were invited to mark the occasion alongside the Corporation
- The hosting of a national school quiz for secondary school students to educate, involve and share information with them on the Corporation's history, operations and development
- A long-service award function for employees

PLIPDECO is always looking for new tenants and there is positive news on the horizon with those in the energy sector related to logistics said to be showing strong interest in its location

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Price may be key factor in T&T bunker ambitions

As a major energy generator and significant oil refiner, Trinidad is clearly one of the Caribbean's top bunkering points. Trinidad has an estimated annual supply capacity of around 700,000 tonnes in a regional market thought to total around 15 million tonnes. Trinidad is second only to Sint Eustatius in terms of market size.

Yet concerns exist about the price of bunkers, the availability and capacity of barges and draught restrictions at some T&T ports. As a result, suppliers are seeing business for larger vessels in particular move elsewhere. Jamaica is cited as providing particularly tough competition.

At present, T&T's Ministry of Energy and Energy Industries has licensed two bunkering companies to operate in the sheltered Gulf of Paria. They are Petrotrin, based at Pointe-à-Pierre, and Ventrin Petroleum, a wholly owned subsidiary of Suriname's Staatsolie, which operates out of Point Lisas.

The National Petroleum Marketing Company (NPMC) buys product from Petrotrin and then sells and supplies bunkers ex-wharf at its Sea Lots terminal and by road tankers at all authorized ports in

T&T including Chaguaramas, Tembladora, Galeota Point, Point Lisas, Pointe-à-Pierre, Port of Spain, Claxton Bay, Brighton-La Brea, Point Fortin, San Fernando and Scarborough (Tobago). Apparently, Petrotrin's barge, 'Marabella', has been out of commission since 2015.

Ventrin, meanwhile, supplies bunker fuel to international vessels calling at ports and anchorages throughout the island of Trinidad.

In addition, Aegean Bunkering (Trinidad) offers marine port and logistics services. The company is based in Port of Spain and is licensed to bunker ships on the north and east coasts.

SHIPREPAIR PROJECT

Trinidad's planned new shiprepair yard development project (see separate story) will also include bunkering facilities. As Wilfred de Gannes told Caribbean Maritime: "Yes, we will most certainly like to offer bunker services to ships after they have been repaired at our facility or at anchorage."

For some time, Trinidad had been looking to expand its bunkering operations and tap into the growing demand for ultra

low sulfur diesel (ULSD). In 2009 Petrotrin announced plans for a new TT\$ 500 million ULSD refinery. But the scheme has been beset with delays and "structural and seismic concerns" as well as wrangles with giant Canadian project manager SNC-Lavalin and contractor Samsung Engineering & Construction of South Korea.

The 40,000 b/d plant is still some way from completion at a time when demand for ULSD is growing fast. In July, Petrotrin president Fitzroy Harewood said he was looking to open the plant in early 2018. It had been due to be completed in 2015.

Trinidad's low sulfur MGO already meets TTBS 569:2011 specification and has been issued with certificates of quality from Petrotrin, says Shameel Mohamed of the NPMC. But low sulfur MGO was priced locally at just over US\$ 850 per tonne in late August compared with just over US\$ 300 for high sulfur fuel oil.

So, with these key developments on the horizon, perhaps there is hope that Trinidad can retain some of its pre-eminence in the Caribbean bunker market. But more competitive prices might be an even bigger factor.



La Brea project to up existing capability

Planned shipyard ideally placed for LNG carrier work

A project to design, build and finance a new US\$ 500 million shiprepair facility at La Brea in south-west Trinidad was given the go-ahead earlier this year.

Proposed by the Shipbuilding and Repair Development Company of Trinidad and Tobago (SRDC), this large-scale industrial project is endorsed by residents and environmentalists alike. It will create opportunities for the twin-island nation to drydock and carry out alongside repairs to vessels of up to 366 meters in length (new panamax size) and beyond.



The planned new yard builds upon Trinidad's long-standing shiprepair capability and will draw upon local expertise and the highly skilled workforce that is already available on the island.

The project's contractor is the China Harbour Engineering Company (CHEC), which is expected to complete construction of the new shipyard in 2018. Project financing was arranged by the Trinidad and Tobago government and the Export-Import Bank of China.

WORKFORCE

The shipyard's chief executive, Wilfred de Gannes, says he anticipates a directly employed workforce of about 600 employees at a one-third utilization rate or 1,200 employees at two-thirds utilization rate (in effect, full capacity).

The key to the project's rationale and

future success can be summed up in three words: liquefied natural gas. The lifting by the United States Congress of its 40-year ban on exports of crude oil and the ending of restrictions on the sale of LNG, together with the commissioning of Cheniere Energy's key Sabine Pass LNG terminal in Louisiana, have made the decision to proceed with the La Brea project timely.

Now that the ban is lifted, the US is switching from a net importer of natural gas to a net exporter – especially with the expected completion of five large-scale liquefaction plants for converting natural gas to LNG. It is estimated that by 2020 there will be a need to service an additional 100 newbuilds for the ocean transportation of LNG out of Louisiana and Texas as a direct result of the ongoing development and commission of five new LNG liquefaction plants in the US.

The key to the project's rationale and future success can be summed up in three words: liquefied natural gas.



Left and above: Elements of the new La Brea Shipyard start to take shape.

The commissioning this year of the third lock in Panama is shortening LNG carrier voyages to Asia by some 8,600 km and the enlarged waterway can now accommodate 92 per cent of the world's LNG fleet.

As things currently stand, the new La Brea facility will more or less have the whole Atlantic Basin as a captive market area. The only possible competition, the Grand Bahama Shipyard – owned jointly, of course, by Royal Caribbean International and Carnival Corporation – will no doubt focus on in-house work. This work will include conversions of cruise ships to LNG-dual fueled propulsion as well as LNG dual-fueled engine maintenance, rather than repairs and maintenance to third-party owned LNG-powered ships.

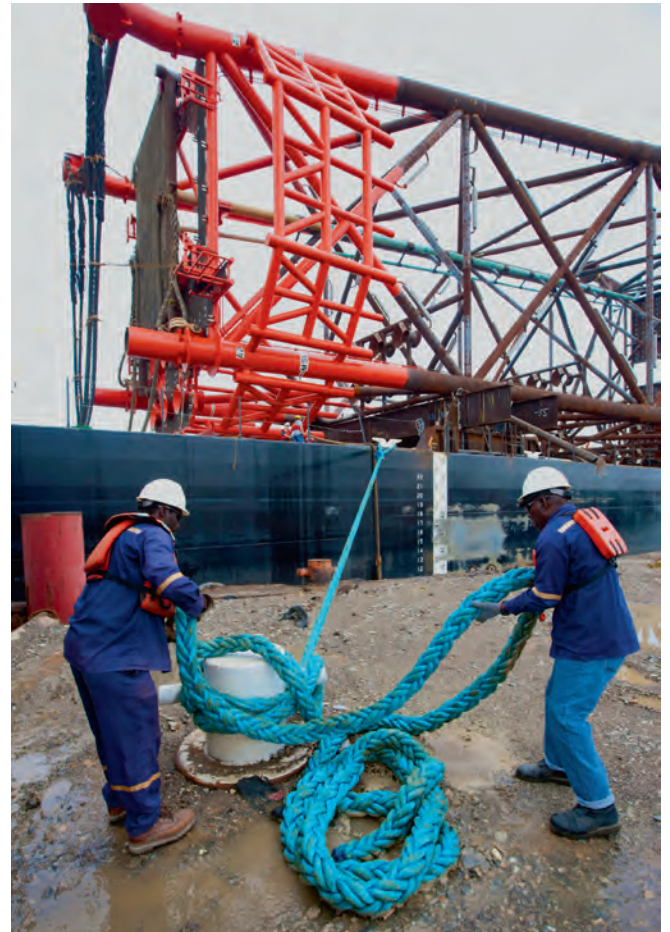
OPTIMISM

Further signs of optimism were in evidence in August when SRDC reported that it had been

approached by a long-established French specialist in the repair of LNG carriers and was finalizing agreements between both parties to commence LNG carrier repairs out of Trinidad in the first quarter of 2017.

Another plus point is that La Brea is close to Trinidad's own Atlantic LNG four-train liquefaction plant at Point Fortin. Furthermore, Atlantic LNG is set to process additional natural gas from the giant 10.25 trillion cu ft Loran-Manatee field, on the maritime borders of Trinidad and Venezuela. Both should provide business for SRDC.

So, with canal expansion a reality and the anticipated hemispheric increase in LNG exports from both the US and Point Fortin, the prospect for Caribbean-based LNG carrier repair capacity is very promising – and it's no doubt the reason why the French are now so keen to get involved.



*50 years ago...
We had a dream...
To build a legacy...
Starting with nothing but a vision.*

**PLIPDECO
FIFTIETH ANNIVERSARY
1966-2016**

The Point Lisas Industrial Port Development Corporation Limited (PLIPDECO) was incorporated on September 16th, 1966 as an initiative of the South Chamber of Industry and Commerce, when a group of businessmen had a vision for an energy based Estate, linked to a deep-water harbour in Central Trinidad. Fifty years later, PLIPDECO has become a regional player in the Port and Industrial Estate Management Industry.

The Port of Point Lisas is now one of the main containers and general cargo ports in Trinidad and Tobago and handles over 55% of the country's domestic (import and export) container trade and approximately 90% of the country's break bulk cargo. In its thrust to diversify itself, the Port offers the following: Warehousing Services for both Import and Export Cargo that are Less Than Container Loads (LCL) and will soon launch a Full Container

Load (FCL) Service for customers who are in need of a warehouse facility for the unstuffing and short term storage of cargo. Other services include Direct Delivery of Cargo, a Demurrage and Detention Collection Service, an Express Processing Service and Bunkering of Vessels alongside berth.

The 860 hectare Industrial Estate is the most mature downstream natural gas complex in the Western Hemisphere and is a core driver of the economy contributing significantly to the GDP of Trinidad and Tobago. Home to over 100 companies, the Estate houses major players in the downstream energy sector that manufacture products in global volumes ranging from

ammonia, methanol, urea and steel. Other players on the Estate include light manufacturing and support service type industries.

The Corporation actively seeks to further position itself on a path of growth and sustainability, through planned expansion of the Port and Industrial Estate. In keeping with its Vision to be "A global leader in Port and Estate Management ..."
PLIPDECO will continue to seek ways

to increase shareholder value and meet and exceed customer expectations by providing a range of valued added, innovative services.

In commemoration of this significant milestone, the Corporation would like to thank all its stakeholders for their contribution to its success and look forward to an even brighter and exciting future.

Point Lisas Industrial Port Development Corporation Limited
PLIPDECO House, Orinoco Drive, Point Lisas Industrial Estate,
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on its

50th Anniversary

Many thanks to you for your continuing efforts
and congratulations on fifty years of excellence!

Here's to the next fifty!

CSA...The Voice of the Caribbean Shipping Industry



Inter-island lifeline

It's a service that provides an economic and social lifeline for the largely tourist island of Tobago. And this better-than-daily service from Trinidad is provided by the state-owned Trinidad and Tobago Inter-Island Transportation Co (TTIIT).

TTIIT offers an alternative to the high-frequency domestic flights of Caribbean Airlines for those with vehicles and lots of luggage. The ferry also docks right in the heart of Port of Spain, whereas air passengers have to make it into town from Piarco – a distance of around 22 km.

SERVICE OPERATIONS

The inter-island service is operated by two fast ferries, the 1997-built 'T&T Express' (840 passengers and 200 cars/vans) and the 'T&T Spirit' (765 passengers and 200 cars/vans). The pair offer a seven-day-a-week

schedule. Crossing time for the 32 km route is just two and a half hours.

The two fast ferries are supplemented by the conventional ro-ro ferry 'Superfast Galicia', which operates between Trinidad and Tobago each weekday. The day crossing time is about five hours. Night crossings are six hours and passengers can purchase a comfortable cabin and arrive in Scarborough suitably refreshed.

The 'Superfast Galicia' can transport up to 112 passengers, 110 trailers and 60 cars and has operated on the route since 2014 when it replaced the ageing and increasingly unreliable 'Warrior Spirit'.

Ticket prices are heavily subsidised by the government – as indeed are air fares between the two islands – and a crossing by fast ferry is just TT\$ 50 for an adult and TT\$ 250 return for cars.

TTIIT offers an alternative to the high-frequency domestic flights of Caribbean Airlines for those with vehicles and lots of luggage



TOOLBOX APPROACH 'CAN STAVE OFF DISASTER'

High-speed oil response technology finds a market in Caribbean

New developments in oil spill response technology have opened the way for response teams to deal more quickly and effectively with any given spill – and in particular to prevent the oil from reaching the shore – say European experts.

The idea is to use conventional booms and skimmers in tandem with recently developed high-speed systems that can recover oil over a wider area, even in difficult conditions. This approach has been dubbed the 'toolbox concept'.

Oil recovery teams face a big challenge in areas with high currents, either offshore, on rivers, in channels or near the coast. The high-speed system was developed as a solution to this problem. The Norwegian company NOFI has had excellent results with its Current Buster system. It is described as "probably the best operational technology available when it comes to oil spill response in demanding conditions, high currents and when the oil has spread over a wide area. Its technology has been developed with the aim of boosting the efficiency of oil recovery as well as covering a larger area".

Already proven in many real-life situations, the Norwegian technology is now being marketed in the Caribbean. The supplier, AllMaritim, works closely with TERHAAR International, which helps companies

to export their services and products. AllMaritim has been particularly active in the Netherlands Antilles. It has supplied Current Buster systems to the Rijkswaterstaat (the Dutch ministry of infrastructure), which is responsible for oil spill preparedness in Bonaire, Sint Eustatius and Saba.

CSA CONFERENCE

A joint presentation on oil pollution response in the Caribbean was given by Randolph ter Haar of TERHAAR International and Gisele de Lucas Mendes of AllMaritim at the CSA conference in Cartagena last October. The conclusion of their talk was expressed thus:

"A meticulous analysis of the ocean and wind conditions in the area, considering the different types of currents and its intensity, is fundamental to choosing the correct oil spill response

technology. Conventional oil booms are a good solution for areas with very little current and wind, especially after the first hours of a blow-out when the oil is still concentrated in a contiguous slick; but the NOFI Current Buster system is a perfect solution for areas with strong currents and demanding conditions.

"These two technologies can be combined in a contingency plan in order to offer a more realistic and effective oil spill response. The conventional system and the high-speed systems can be chosen according to the sea condition or in different periods of the response – for example, the conventional system in the first six hours, when the oil is still concentrated; and the Current Buster after the six hours when the oil has spread to a larger area.

"That is the base of the



toolbox concept. It's important to have different technologies available in case of an oil spill incident because it's impossible to predict the exact scenario. Different booms, oil barges and skimmers should be available to deal with different scenarios. To bet on a single technology is a recipe for failure. In areas with low infrastructure it can be a good solution to establish a minimum resource needed in the first hours and perhaps create alliances to share resources in case of large oil spill."

The Caribbean region, of course, is no less vulnerable to oil spills than any other part of the world. Randolph ter Haar told Caribbean Maritime:

"The Caribbean islands are vulnerable because of the activity in the area. It is a busy transport route to and from the region. The Panama Canal is nearby and we have oil and gas exploration in the region as well. Many islands depend on tourism and oil spills can be disastrous for the islands."

Trond Dale agrees. "There is a whole range of scenarios," he told Caribbean Maritime. "There is tanker traffic, terminals and industry in the area, which are all a potential threat to the environment. Looking at the biggest oil spills in the past 10 years, they are all from a vessel grounding or collisions. A small spill might be as expensive as a bigger spill, as you will need to activate more or less the same resources. The impact might be different, but the operators still need to take care of the oil spill, either on the sea or when it has hit the shoreline and beaches."

Mr Dale said the type of equipment used to deal with a spill depended a lot on the type of spill. "Is it in the harbor or in open water? Is it a light or heavy type of oil? Products used in more or less all oil spills are

oil booms and skimmers of different sizes and capacities, temporary storage systems, absorbents, shoreline cleaning equipment and, of course, any vessels of opportunity. Personal protective equipment for all members working on a spill is very important and something that is often forgotten about."

According to Mr Dale, the best known and most used technology when tackling an oil spill is conventional booms. "These booms are effective when used correctly, but are also highly ineffective when not operated in accordance with their speed limit of 0.7 to 0.9 knots through water." He said it was not unusual for these boom systems to be operated by inexperienced personnel, while currents in the area were not always taken into account. "If the boom is towed too fast through the water, it causes the oil collected in the apex of the boom to dive and go under the boom."

Enter the Current Buster, developed by NOFI to tackle the problem of oil booms moving too quickly through the water. Mr Dale said the aim had been to develop a system that was not oversensitive to speed through water. Developed in 1999, the Current Buster has been tested at the Ohmsett research facility in Leonardo, New Jersey, and has been used in oil spills around the world with great success, with over 400 units being sold to major oil companies and responders worldwide.

"Rijkswaterstaat has been a valuable partner in the development of new technologies as well as a good client," said Mr Dale. The technology package supplied by AllMaritim for use in the Netherlands Antilles is designed with all-in systems – "meaning that each and every container unit had everything

needed included. The operator only has to provide for a vessel to be able to start its response. AllMaritim has subsequently visited each location and performed training and exercises with the local crew in order for them to be prepared."

ENLARGED CANAL

Of course, with the opening in June this year of the enlarged Panama Canal, there is already a significant increase in 'new panamax' sized vessel traffic, including tankers. Could this have an effect on the level of potential oil spill hazard in the Caribbean region?

Mr Dale told Caribbean Maritime: "Any change and increase



in vessel traffic will also affect the risk and potential of an oil spill. It is therefore important to be prepared for it, to have the proper equipment in place, to be well trained and to have the response systems in place in case an incident should occur."

KEY PLAYERS

AllMaritim AS, based in Mathopen, Bergen, Norway, has been involved in sales and marketing of oil spill response products since 1988. Its managing director is Trond Dale; and Gisele de Lucas Mendes is the commercial manager for Brazil.

TERHAAR International, of Driebergen-Rijssenburg, in the Netherlands, helps companies to export their services and products around the world. Its focus is on emerging markets and many of its clients are technology companies. The company is owned and run by Randolph ter Haar.

'Always bear in mind that it is much more costly to clean up oil when it reaches the coast than to recover it from the water' – Randolph ter Haar and Gisele de Lucas Mendes (pictured)





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TII SECURITY

PREVENTION IS BETTER THAN CURE

Why investing in 'hard target' security measures is money well spent

Time and time again we witness failures in the system because an organization is unwilling to implement recommended security measures and practices in a bid to save upfront costs. This typically leads to much higher costs in the long run. Dave Robinson looks at basic security elements that can make ships and facilities harder targets, while recommending new technologies to deal with potential threats.



By Dave Robinson

President and chief executive of Tactical Intelligence International, LLC, based in Clermont, Florida

Security threats – whether theft, terrorism or other criminal act – require the same basic elements in order to be carried out, namely, intent, access and opportunity. Similar to putting out fire, removing just one of these basic elements can mitigate the risk, greatly enhancing an organization's security posture.

INTENT

Intent to commit a crime or terrorist act can be removed if it is determined that the act itself is too risky. Target selection is a major factor in the planning phase and criminals generally conduct a simple cost-benefit analysis.

So what determines whether you are a soft or hard target? Obviously, physical security equipment and procedures are a major factor, but one area often overlooked is the knowledge, professionalism and capability of the local guard force or shipboard security personnel. Ask yourself how many times you've walked into a bank

or a shopping mall and been confident that the guard on duty could handle an extreme situation.

The level of professionalism – or even appearance of professionalism – of your security personnel is a major factor in threat mitigation. This begins at the hiring process and continues with an established training program, including drills and exercises. Maritime industry authorities, including recent US Coast Guard Directives, MARAD, the IMO and the International Maritime Bureau, all agree that one of the key deterrents to criminal acts in ships and ports is consistent staff training. Tactical Intelligence International (TII) recommends that full-time and part-time personnel, including contractors, must be trained in:

- (a) Relevant provisions of the Facility Security Plan (FSP)
- (b) Meaning and requirements of MARSEC including emergency procedures.

The ISPS Code further requires regular staff training and the conducting of drills and exercises at each level of MARSEC.

Facility security staff should be trained to detect dangerous substances and devices; to recognize who is likely to threaten security; and to know about techniques to circumvent security measures.

Although work schedules generally preclude all-hands training events, it is recommended that specific times be set aside monthly for security and safety drills involving local law enforcement agencies and first responders.

ACCESS

One of the biggest challenges for a major port is access control. Tracking and monitoring hundreds of contractors each day is a daunting task. Access control measures may include security gates, perimeter walls and fencing, ID badges and background screening. Often, security resources become diluted by other duties. TII recommends an increase in security staff to take care of these collateral duties so as not to dilute core security functions.

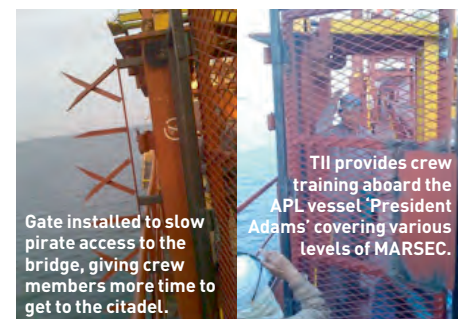
The internal threat to any large-scale



Breach in the fence observed during a facility security assessment.



A 'suicide bar' designed to prevent vessel access and provide visual appearance of a hard target.



Gate installed to slow pirate access to the bridge, giving crew members more time to get to the citadel.

TII provides crew training aboard the APL vessel 'President Adams' covering various levels of MARSEC.

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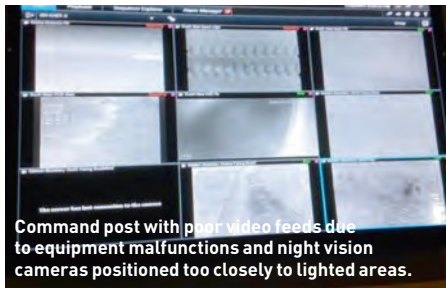
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operation, vessel or facility is a constant concern. How do you stop a bad guy who has been given authorized access? It is impossible to detect all theft, but increased surveillance, screening, inventory control measures, incentives for staff and watch standing at vulnerable areas should be carefully planned and implemented. Security officers should be stationed at primary access points and should randomly screen vehicles and contractor personnel. Signage should be posted indicating All Vehicles Subject to Search and security personnel should be trained and equipped to conduct thorough vehicle searches. Remember that access FROM a facility is as important to a perpetrator as access TO a facility.

All watch standers should have a back-up working in the vicinity. TII recommends the rotation of watch personnel with relief in place every four hours to help everyone stay vigilant and mentally alert. This also helps to minimize the potential of the insider threat, for example a security guard who is bribed to look the other way or not report a crime. All watch standers should be briefed on good watch standing practices because they are the first line of defense for that vessel or facility.

Early detection of potential threats is essential. The sooner information is reported to the supervisor, the sooner he or she can decide on a course of action. As we have seen in numerous piracy attacks at sea, watch standers have prevented pirate access and hijacking through early detection and warning. The appearance of a vessel or facility to be difficult to access is often enough to deter a criminal or terrorist act.

OPPORTUNITY

Surveillance systems are an extremely effective deterrent to theft. Cameras should be placed at all potential access points, including waterside access and remote locations that are seldom patrolled. Cameras should have overlapping fields

of view and provide 24/7 coverage. Actively monitoring these cameras feeds and having a rapid response capability in place is imperative. A typical vulnerability assessment includes 'red cell' scenarios where we attempt to breach a facility and then see how long it takes for security personnel to respond. Typically, one or two personnel respond within 10 to 15 minutes. Sometimes no one responds at all.

So, how is this possible in today's security-conscious environment? We have inspected numerous clients where one guard is responsible for gate access control while simultaneously trying to monitor dozens of live camera feeds. This is an impossible task. Lack of manning, for whatever reason, is a major factor in creating opportunity. Monitoring stations need to have a designated person to observe the feeds. The US Navy recommends that watch standers shall "not be assigned or assume any other duties which may distract them from their watch function".

EQUIPMENT

Clients often have a 'fire and forget' attitude when it comes to security equipment. Once the system is bought, paid for and installed, they are rarely checked for positioning, coverage and functionality. We have been in many command posts where monitors are showing no camera feeds or the picture is obscured. Often, Forward Looking Infrared (FLIR) cameras are ineffective in a marine environment, especially in the Caribbean, due to the small temperature differential between the water and the heat signature of the human body. Night vision cameras positioned too closely to lighted areas also hinder surveillance.

Cameras have a shelf life and need to be on a regular maintenance schedule. Even with a fully functioning camera, factors

such as poor weather, low light or glare can greatly reduce detection. There are several 'plug and play' systems now available that can enhance video imagery in real time, providing an all-weather, day and night capability without having to upgrade your entire surveillance system. These systems essentially remove the darkness or poor conditions from the video image, allowing watchers to detect finer details such as facial features and license plates.

Lighting provides another deterrent and minimizes opportunities for intruders and thieves to come and go undetected. Ample lighting should be provided in all areas containing equipment and inventory as well as

Look through the eyes of a thief and try to determine whether you are a hard or a soft target

potential access points and locations.

Last, opportunity can be created through predictability. All too often, security guards develop a routine. If an intruder knows it takes 20 minutes for a guard to complete his patrol circuit, he can plan for a 20-minute window where he is virtually guaranteed not to be observed. Roving patrols should be instructed to vary their patterns to maintain an element of unpredictability.

Look through the eyes of a thief and try to determine whether you are a hard or a soft target. Conduct a review of security personnel, procedures and equipment and make an honest assessment of what could be improved. Walk the property day and night and see if you can identify any weaknesses.

Adhering to recommended security protocols will help remove criminal intent, access and opportunity, providing a safer work environment while saving long-term costs to your organization.

PORT BRIEFING

1

PANAMA NEW CONTAINER TERMINAL FOR COLÓN

Chinese investment will be used to build Panama's first container terminal dedicated to post-panamax vessels in Colón following an agreement between the Panama Maritime Authority and the Chinese consortium Panama Colon Container Port. The China Communications Construction Company is expected to build the terminal. The US\$ 900 million agreement includes a 2.5 million teu container yard with four berths totalling 1,800 meters with a depth alongside of 18.0 meters as well as multipurpose facilities for LNG and energy related projects.



2

PANAMA 20-YEAR LEASE EXTENSION OF CCT

Evergreen Marine Corporation of Taiwan has secured a further 20-year lease on the Colon Container Terminal (CCT) in Panama. The previous 20-year concession was signed in 1996. The agreement was approved just before the opening of the expanded Panama Canal on 26 June. CCT opened its Berth 4 in November 2015 and can now handle two containerships of 12,000 to 14,000 teu. Additional investment will further increase quay lengths to 700 meters by early 2017. The terminal's annual capacity will rise from 1.5 to 2.4 million teu. Terminal 4 was conceived to serve the anticipated increase in traffic due to the canal expansion program.

3

VENEZUELA ARMY TAKES CONTROL OF MAIN PORTS

The President of Venezuela has placed the country's five main ports – Guamache, Guanta, La Guaira, Maracaibo and Puerto Cabello – in the hands of the military. Army General Efraim Velasco is now in charge of the port authority that manages these five ports. The declared aim is to tackle corruption and poor practice while helping to distribute food and medicine throughout the nation as its economic condition worsens. General Vladimir Padrino, the current Minister of Defense, said it was essential to calm unrest over food rationing, but he didn't want to see the ports militarized.

4

NICARAGUA NEW TERMINAL AT BILWI

The imbalance between ship calls on the Pacific and Caribbean coasts of Nicaragua is being addressed by a US\$ 400 million investment by the National Port Company in a new terminal at Bilwi, Puerto Cabezas. It would handle cargo that currently goes through Limón, in Costa Rica, and Cortés, in Honduras. The expansion will allow Bilwi to handle up to 4 million tons a year. The government is also investing US\$ 224 million in modernizing the existing ports of Salvador Allende and San Juan del Sur as well as dredging the port of Bluefields.

5

JAMAICA

KFTL FINALLY TAKES OVER TERMINAL

Kingston Freeport Terminal Ltd (KFTL) has finally taken control of Kingston Container Terminal after CMA CGM signed a US\$ 510 million, 30-year concession with the Port Authority of Jamaica in April 2015 to operate the terminal. Expansion work, including dredging and infrastructural development, is expected to begin immediately. CMA CGM's intention is to create a Caribbean hub linking the US East Coast, the Gulf of Mexico, the Caribbean and northern Brazil to handle the new traffic in post panamax vessels transiting the expanded canal. The terminal will eventually be equipped with 18 gantry cranes and 60 straddle carriers and will have an annual capacity of 3.6 million teu. KFTL is a subsidiary of Terminal Link and CMA CGM Terminals.

6

USA

RECORD CONTAINER MOVEMENTS FOR NEW ORLEANS

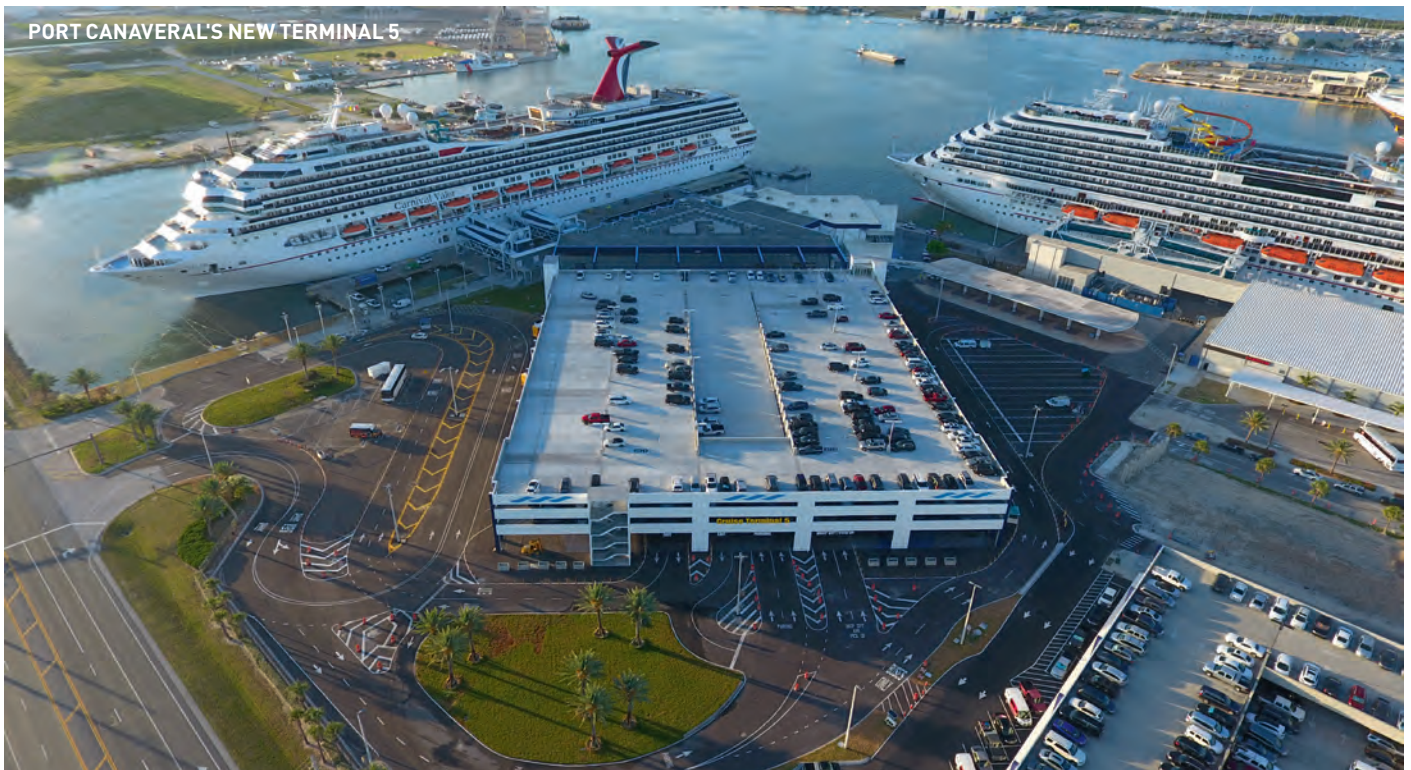
The Napoleon Avenue Container Terminal in the Port of New Orleans moved more than 50,000 containers in April 2016, the highest monthly figure on record at the port, beating the previous record by over 2,000 containers. The two-monthly total for March and April was also up 6.1 per cent on the previous year. In 2015 the terminal handled a record 525,000 teu, up seven per cent on 2014. The terminal has received nearly US\$ 40 million in new investments over the past year to improve efficiency and boost handling. As a result of these figures, New Orleans was named the fastest growing import and export port in the US by the Journal of Commerce. The port also has a master plan to expand the terminal to handle up to 1.5 million teu a year.

7

USA

PORT CANAVERAL CRUISE TERMINAL REOPENS

Following a US\$ 48 million refurbishment, Port Canaveral's Cruise Terminal 5 reopened in June with a call by the 'Carnival Valor'. Carnival Cruise Line uses the terminal for its three ships based at Port Canaveral (the other two are 'Carnival Magic' and 'Carnival Victory'). The work included upgrades to the terminal building, a 120 ft pier, parking for over 1,000 cars and mobile boarding bridges. The expansion allows the terminal to accommodate cruise ships carrying up to 3,500 passengers. Work is also under way on Terminal 10 to enable it to accommodate 4,500 passenger vessels. The US\$ 35 million project is due for completion in November 2016.



1

PORT CANAVERAL ACQUIRES LOGISTICS CENTER

Port Canaveral has purchased the Titusville Logistics Center, located 15 miles from the port. The facility covers nearly 250,000 sq ft and has 22 bays, truck tailgate docks with drive-in doors, and 10 doors onto a new rail spur. The real estate department is now actively seeking and leasing space to companies of all sizes. There is easy access from the logistics center to US Highway 1 and Interstate 95.

2

JAMAICA DRY DOCK BACK ON AGENDA

A new dry dock in Jamaica is finally becoming a real possibility. During his budget speech in May, Prime Minister Andrew Holness said the government had begun negotiations with a German company. The dry dock would have the potential to create 500 jobs when operational and has long been viewed as a key instigator of growth for the marine industry in Jamaica. No location has yet been specified, but Jackson Bay in Clarendon has been previously identified as a suitable site.

3

NEW OIL REFINERY FOR ARUBA

A commercial agreement between CITGO Aruba and the Aruban government will see the reopening of one of the Caribbean's largest oil refineries, in San Nicolas, Aruba. The refinery, previously operated by Valero Energy Corporation, has been idle since 2012. Under the new 15-year lease, CITGO Aruba will operate the refinery, with CITGO Petroleum Corporation providing services. The lease also has a 10-year extension option. In an investment worth up to US\$ 650 million, the refinery is expected to be converted to enable it to upgrade extra heavy duty crude into intermediate crude before it is shipped to CITGO in the USA for further processing.

CRUISE NEWS

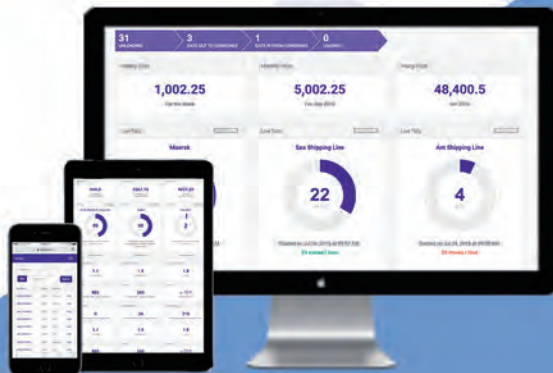
- Royal Caribbean has completed a US\$ 50 million upgrade of 'Empress of the Seas', which will home port in Miami. After an initial sailing to Royal Caribbean's private Bahamas island, Coco Cay, the ship will operate on a route calling Miami, Nassau, Cozumel, Grand Cayman and Key West.
- The maiden season of Princess Cruises' 'Caribbean Princess' will include 10-day cruises through the new Panama Canal locks. The ship will also launch a new 14-day Caribbean Circle itinerary out of Fort Lauderdale, including a new destination for the company, Trinidad and Tobago.
- Carnival Corporation has reported record second-quarter earnings in 2016, with bookings for the rest of the year well ahead of 2015. The company expects a 20 per cent growth in turnover this season.
- Florida to Cuba itineraries will soon be available from Miami-based Victory Cruise Lines, which plans to offer cruises from Port Canaveral to Cuba using its 300 ft, 5,000-ton 'Victory I'. The vessel has been fully renovated and now offers 101 staterooms and a maximum capacity of 202 passengers.
- Norwegian Cruise Line's newly renovated 'Norwegian Dawn' recently arrived at its home port of Boston. The renovation is part of the Norwegian Edge program, a US\$ 400 million initiative by the cruise line to give its vessels a new look and feel. The ship begins a new itinerary to Bermuda in October.



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MONTEGO BAY

4

MONTEGO BAY SET FOR MAJOR INVESTMENT

The Port Authority of Jamaica (PAJ) is to invest about US\$ 40 million in upgrading the Port of Montego Bay to a regional multipurpose port that will accommodate more cruise ships as the demand for home porting intensifies.

Dr Horace Chang, of the Ministry of Economic Growth & Job Creation, made the announcement at a press conference in Montego Bay in August.

“There will be retrofitting of the current facilities,” said Dr Chang. “For example, the current cruise ship pier has to be improved significantly to support the traffic we are going to have with home porting. Some of the current warehouse space will also be changed and transformed, while new warehouse space will be acquired.

“We are expanding the berthing facilities so that we can take three cruise ships at any one time. The demand for home porting is growing and we have to make this required investment.”

Dr Chang said this investment was in addition to the fuel terminal being installed by New Fortress Energy at a cost of US\$ 175 million. He said there would be a dedicated cargo berth. “It will be affiliated with the fuel port, so it will be cargo and fuel.”

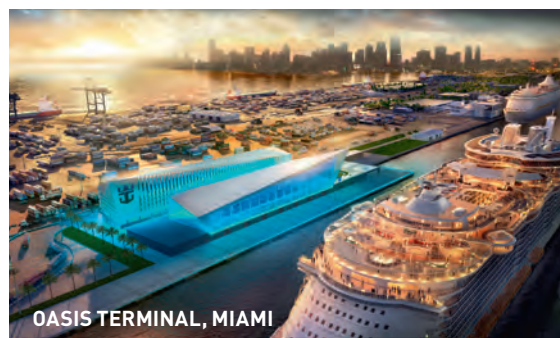
William Tatham, vice president of cruise shipping for the PAJ, said: “We will have seven vessels home porting this season, up from five. And next year we are anticipating nine.”



5

NEW OASIS CRUISE TERMINAL IN MIAMI

Royal Caribbean Cruises has agreed with Miami-Dade County on the construction and operation of a new cruise terminal at PortMiami. Scheduled for completion in late 2018, the terminal will cover some 170,000 sq ft and will act as a home port for the company's vessels, including the 5,400-passenger Oasis class. PortMiami currently handles about 750,000 Royal Caribbean Cruises passengers a year. On completion of the new terminal, that figure is expected to rise to 1.8 million – almost a third of the port's total cruise passenger throughput.



OASIS TERMINAL, MIAMI

6

PORT MANATEE MASTER PLAN

An updated master plan providing the framework for a diverse growth and investment program at Port Manatee in south-west Florida over the coming decade was approved by the Manatee County Port Authority in June. This includes a five-year, US\$ 126 million investment program of improvement and maintenance of infrastructure to cope with an anticipated 120 per cent growth in cargo tonnage over the next 10 years. Port Manatee handles about 8 million tonnes of cargo a year and is the closest US deepwater seaport to the Panama Canal.

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TOUGH TIMES IN CHARTERING SECTOR



SELECTED CONTAINER FIXTURES

SUB 1,000 TEU - GEARED, CELLED

May 16	Sina 511 teu / 270@14 / 16on19 / 84rp	1-3 months	US\$ 6,000. p/d
Jun 16	Deneb J 951 teu / 567@14 / 18on36 / 170rp	12 months	US\$ 8,000. p/d
Jun 16	Chaser 889 teu / 534@14 / 18on29 / 160rp	1-3 months	US\$ 6,850. p/d
Jul 16	Vega Sagittarius 966 teu / 604@14 / 18on35 / 252rp	2-5 months	US\$ 7,700. p/d

1100 TEU - GEARED, CELLED

May 16	Asian Sun 1,118 teu / 700@14 / 20on36 / 220rp	3-6 months	US\$ 7,900. p/d
Jun 16	Boston Trader 1,083 teu / 650@14 / 19on40 / 200rp	6-8 months	US\$ 7,725. p/d
Aug 16	Asian Sun 1,118 teu / 700@14 / 20on36 / 220rp	5-7 months	US\$ 7,700. p/d

1300 TEU - GEARED, CELLED

Jun 16	Stadt Gera 1,296 teu / 957@14 / 20on47 / 390rp	3-9 months	US\$ 7,900. p/d
Jul 16	Bomar Regent 1,338 teu / 925@14 / 20on46 / 449rp	2-4 months	US\$ 8,000. p/d
Aug 16	Stadt Jena 1,296 teu / 957@14 / 20on47 / 390rp	5-6 months	US\$ 8,100. p/d

1700 TEU - GEARED, CELLED

May 16	Caribbean Express 1,674 teu / 1234@14 / 19on54 / 300rp	3-5 months	US\$ 8,000. p/d
Jun 16	Hs Smetana 1,740 teu / 1278@14 / 21on65 / 298rp	6-12 months	US\$ 8,000. p/d
Jul 16	Rhl Agilitas 1,732 teu / 1275@14 / 20on58 / 379rp	4-11 months	US\$ 7,150. p/d
Aug 16	Nefeli 1,740 teu / 1274@14 / 20on65 / 300rp	6-10 months	US\$ 7,000. p/d

2500 TEU - GEARED, CELLED

May 16	Frisia Kiel 2,478 teu / 1916@14 / 22on86 / 400rp	1-3 months	US\$ 6,350. p/d
Jun 16	Ems Trader 2,450 teu / 1886@14 / 22on81 / 400rp	11-13 months	US\$ 7,700. p/d
Jul 16	Buxlink 2,478 teu / 1914@14 / 22on84 / 410rp	3-12 months	US\$ 6,000. p/d
Aug 16	Danae C 2,524 teu / 1886@14 / 21on76 / 392rp	5-12 months	US\$ 6,000. p/d

CONTAINER MARKET

Compared with last year, chartering activity did not pick up during the second quarter. In general the very small sub 900 teu and the larger 1,700 teu plus feeder vessels underperformed the 1,100 to 1,300 teu segments.

The small market for 600 to 700 teu ships showed some surplus vessels during the last months. This imbalance, however, did not cause charter to fall, as ships were fixed for US\$ 6,000 to US\$ 7,000; but periods shortened significantly. Period charters of about 12 months, common a year ago, disappeared; short and flexible was the new norm.

The 1,100 teu sector's supply and demand was at equilibrium over the last couple of months. Stable demand and little ballasting activity led charter rates to stay in the high US\$ 7 thousands. Talking on absolute levels, the 1,300 teu ships were once again the best performers. Charter rates remained at around US\$ 8,000 since the available tonnage in the Caribbean stayed constant.





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MANZANILLO, MX
PUERTO QUETZAL, GT
ACAJUTLA, SV
SAN LORENZO, HN

MCX2

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CORINTO, NI
CALDERA, CR

PWX

BALBOA, PA
BUENAVENTURA, CO
GUAYAQUIL, EC
CALLAO, PE
MATARANI, PE
IQUIQUE, CL
SAN ANTONIO, CL
SAN VICENTE, CL

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PAITA, PE
GUAYAQUIL, EC

PIX

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COLON, PA
RIO HAINA, DO
CAUCEDO, DO

PVX

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CURAÇAO PORTS
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Why Ports of Curaçao?

The Ports of Curaçao offer competitive advantages for safe, fast and reliable handling of ships and cargo, by providing a modern infrastructure and excellent maritime and logistical services. The Curaçao Ports Authority continuously develops and manages the ports ensuring quality nautical services in an environmentally responsible manner.



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Building towards the Future



CONTEX

	CONTEX	12 MONTHS, 1100	12 MONTHS, 1700	24 MONTHS, 2500
May 16	338.75	7,320	7,467	7,545
Jun-16	333.11	7,194	7,374	7,447
Jul-16	329.13	7,103	7,242	7,378
Aug-16	322.57	6,963	7,071	7,205

About equal numbers of vessels left for drydocking to other areas as were positioned from Asia to the better-paying Americas.

Vessels of 1,700 teu did not fare as well. In July and August especially, rates came under pressure and fell by over 10 per cent due to the fact that several vessels had run into spot positions. With earnings levels at about US\$ 7,000 those ships were substantially below the smaller sizes, but port limitations and reefer capacity did not allow operators to utilize bigger, cheaper vessels.

Standard 2,500 teu tonnage was in even stronger trouble. Charter rates fell by about five per cent to US\$ 6,000. The traditional rate premium for trading in the Caribbean had thus been completely eroded, as this vessel category earned about US\$ 6,000 in all trading areas worldwide. Ships with a high reefer capacity of at least 500 plugs continued to earn significantly more, with individual rates ranging from the high US\$ 8 thousands up to US\$ 11,000 depending on duration and specific trade demands.

An interesting development over the last couple of months has been the trend to employ a higher share of gearless containerships. Since the start of this year seven small containerships of between 300 and 700 teu have been positioned from Europe or Asia to the Caribbean / Central American trading area. Out of those seven only two are geared. A similar situation showed for some of the largest feeder vessels. This year, six out of 10 containerships ranging from 2,500 to 3,400 teu that have been positioned to the Caribbean are gearless.

No clear trend in the vessel size of feeder services could be observed in the last four months. Where some operators combined their schedules and upsized from 2,500 to 3,400 teu, others split their joint service and went back from 2,500 to 1,100 / 1,300 teu tonnage.

SALE AND PURCHASE OF CONTAINER TONNAGE IN CARIBBEAN

Several smaller containerships of between 500 and 1,100 teu changed hands in the last couple of months. Operators continued to be active buyers, as about half of the vessels sold went to end users. Most sales, however, were not from 'willing sellers' but bank driven. Sales prices consequently remained rather low.

MACROECONOMICS

The International Monetary Fund forecasts an economic contraction of 0.4 per cent for Latin America and the Caribbean. This figure, however, is strongly influenced by the second dismal year for the Brazilian economy, which is expected to shrink by over three per cent this year.

Signals from the United States, one of the most important trading partners, were mixed. Industrial investments were down, but consumption grew on the back of cheap gas prices, low interest rates and better job market numbers.

Venezuela continued to be a drag on the region's development. An expected GDP fall of 10 per cent and extreme inflation of several hundred per cent exerted ever stronger hardship on the population. Severe food shortages were the result of falling imports, while manufacturing across the country was limited by an insufficient supply of electricity. Over the last three years container throughput has halved from 1.4 million to 0.7 million teu and industry sources say the situation has deteriorated further in 2016. At the end of August, 12 services employing 18 cellular containerships of between 700 and 2,500 teu continue to call Venezuelan ports.

Venezuela's declining oil production capacities also hurt the Cuban economy. An 'oil for doctors' trade deal between the two

countries accounts for an estimated 20 per cent of Cuban GDP and Venezuela delivered 40 per cent less oil in first quarter 2016 than a year ago.

Optimism about Cuba-US relations from the beginning of the year died down in the second quarter. The general trade embargo and the 180-day rule both remain in place and forecasts are that nothing will happen until after the US presidential elections and the planned resignation of Raul Castro in early 2018. The abolishment of the 180-day rule, which prohibits a vessel from calling an American port for 180 days after calling Cuba, could hurt US ports and feeder operators. Without this limitation, cargo for Cuba being carried on a mainline Far East to US East Coast service could be discharged directly at Mariel without being transhipped first.

REEFER

Chartering activity for larger vessels did not get better in the last four months. The COA and liner operators continued to be employed; but the remaining independent owners faced a terrible season and an even stronger declining summer period. No squid, no surplus of bananas, nothing! Only citrus out of Argentina turned out to be more active; but as the business had been covered by operators on a COA basis, this had no real influence on the spot market. Signs are that 2016 is going to be one of the worst years for conventional reefer owners.

The small section suffered, too, and freight rates partly fell by 50 per cent and more in some of the fish trades. Rather unusually, some fish owners decided to put tonnage into lay-up. As the catching got better and the restrictions on Nigeria eased during June, freight rates again improved somewhat. Compared with the previous two excellent years, owners of the smaller section will certainly also be facing depressing results.



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We need a sharper focus on quality management

In today's fast-paced, highly competitive world, mere seconds lost translate into missed opportunities and possibly loss of revenue. In order to stay ahead of competition, it is important that businesses streamline their processes not only to function effectively but also to meet the needs of their customers efficiently.

WHAT IS QUALITY?

Quality can be defined as the extent to which a product or service fulfils requirements and the results of these requirements are fit for use. In order to deliver a product or service that is considered to be of excellent quality, the needs of all stakeholders must be met.

With the definition of quality in mind, we can further say that quality management focuses on the processes of a business or organization, the customer and continuous improvement. An organization's product or service depends on a set of requirements or specifications that were previously gathered. Conformance to these requirements is used to determine the quality of the end product.

WHY IS QUALITY MANAGEMENT IMPORTANT?

According to an article posted by the American Society for Quality, the benefits of implementing quality management include:

- Adaptability to changing or emerging market conditions and to environmental and other government regulations
- Higher productivity
- Enhanced market image
- Elimination of defects and waste
- Reduced costs and better cost management
- Higher profitability
- Enhanced shareholder and stakeholder value
- A strengthened competitive position

How can the shipping industry strengthen its quality management process? In order to compete in today's market, shipping companies will need to sharpen their focus on quality management in all aspects. Quality management is globally welcomed and it may be seen as a driving force in improving safety and service at all levels. With the development of standards and regulations, it is in a company's best interest to include these standards in all projects that may be undertaken.

A standard, as defined by the International Organization for Standardization (ISO), is "a document that provides requirements, specifications, guidelines or characteristics that can be used consistently to ensure that materials, products, processes and services are fit for their purpose". A series of case studies conducted by the ISO in 2010 revealed that companies may achieve the following key benefits from using standards:

- Streamlining internal operations. Standards can be used to streamline internal processes by reducing the time needed to perform certain tasks, decrease waste, cut costs and increase productivity. The case study reports that "the contribution of standards to the gross profit of companies ranges between 0.15 per cent and five per cent of the annual sales revenues".
- Innovating and scaling up operations. Some case studies revealed that standards served as the basis for innovating business processes.
- Creating or entering new markets. Standards have been used as the basis for

developing new products or services and penetrating new markets, both locally and internationally.

Organizations which adopt industry standards are better poised to providing a more efficient product or service. The quality standards that are widely used include the ISO 9000 series, the International Safety Management (ISM) code and the International Security Management Association (ISMA) standards. Even though utilizing these standards does not guarantee quality, they can be used as a benchmark for measuring an organization's commitment to quality.

AN EXAMPLE

Here is an example of the importance of quality management in projects. Every day, more and more organizations are adopting quality management with their projects and service delivery. The recent opening of the Panama Canal's new locks can be seen as a huge development for the shipping industry. An article published in

June by World Maritime News said the new locks "promise more transits and increased revenue for Panama while bringing more cargo to the US East Coast and Caribbean ports faster and cheaper".

It was surprising, however, that shortly after the opening, a neopanamax container ship of 8,500 teu (the 'Xin Fei Zhou') struck one of the canal's new locks. A study released by PGI Intelligence said the locks – measuring 427 meters long and 55 meters wide – were too small for neopanamax

ships: "The largest vessels can measure up to 366 meters long and 49 meters wide, leaving a distance of just 6.0 meters across the width of the canal and 61 meters lengthwise, much of which will be taken up by tugboats on either end of the vessel to guide it through the lock. A joint study by the International Transport Workers' Federation (ITF) and Brazil's Fundação Homem do Mar (FHM) found that, in windy conditions, the maneuverability of vessels would be compromised, making accidents likely due to the lock's narrow dimensions."

With the concerns brought forward by the study, one is left to wonder about the extent of planning and quality management



that was conducted during the project life-cycle. Were all the measurements required prior to the start of building correctly assessed? Was the length of the containerships taken into consideration? Were the measurements continuously checked during the building of the new locks?

Using this example, we can see that it is imperative that quality is continuously measured in order to not only provide excellent service but also to mitigate additional costs that may arise.

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