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# Jamaica

Maritime and Logistics Review 2019-20

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# Jamaica is open for business

**Indeed, the Government is building a new Jamaica which enhances the authentic brand Jamaica. Already, the country is best known for its vibrant music, record-breaking athletes, delicious food, and resilient people.**

The vision of Jamaica as the place of choice to live, work, raise families and do business is increasingly becoming a reality with the growth in logistics, maritime and infrastructure industries signalling that Jamaica means business. The growth and expansion of the logistics sector will propel Jamaica as the fourth node in the global logistics chain (as described below).

Given the country's natural harbours that are strategically located along global shipping lanes, complemented by a solid infrastructure and a large and skilled workforce, Jamaica is the perfect environment to foster development in this sector, making the country the hottest and most attractive location for investment this side of the globe.

The major strategy to propel the sector was the launch of a logistics master plan in 2017 that would transform the island into the fourth node of the international logistics chain, which also includes Singapore, Rotterdam, and Dubai. The Global Logistics Hub Initiative (GLHI) will make Jamaica a logistics-centred economy that will positively impact a large section of the Jamaican population.

We have a unique opportunity to leverage the physical and performance dimensions of our assets to attract investments in this sector; and a logistics-centred economy would mean that not only will logistics

grow, but other sectors like tourism, manufacturing and outsourcing would be positively impacted as part of a network of connected services and industries.

As a Small Island Developing State, the initial stages were not easy however our shared determination strengthened the new focus on logistics. Though the genesis of the GLHI was somewhat challenging, we pressed on, and now we are closer to achieving our overall goal.

The island has increased its activity in logistics by improving road networks, divesting our major airports to improve efficiency and services offered, and attracted investments from major international players like CMA CGM, which invested \$450m in dredging and quay expansion. Recently, a local player, Kingston Wharves Limited (KWL), also expanded its port logistics facilities in Jamaica's capital Kingston by developing a new 143-acre modular warehousing complex. The initial investment is valued at \$30m.

These companies represent just two of Jamaica's success stories in logistics with the sector contributing \$728m to the country's GDP in 2017, and these numbers are predicted to grow with the full implementation of the Jamaica Special Economic Zone regime – an initiative geared towards achieving continued growth, fitting Jamaica into the global value chain and bringing significant investments to Jamaica. The Jamaican government is also working to create the macro-economic environment for logistics and other sectors to thrive, and we are making significant progress in improving



the ease of doing business to create a stable environment for growth.

This publication is therefore timely, as numerous opportunities in logistics and infrastructure are emerging, and the success of these sectors is rising. In this supplement you will read about the development of logistics in Jamaica, the new economic zones and the investment opportunities that are available; you will understand why Jamaica is the ideal location for the logistics industry in the Caribbean, and you will see the exciting investment projects that are taking place on the island.

I believe that Jamaica will become a fully realised Logistics Hub; we are already off to a good start which coincides with the current national vision 'Jamaica 2030' to make Jamaica the place to live, work and do business by the year 2030, and Jamaica's logistics industry will play a significant part along this journey to development.

As you read this publication and examine the opportunities that are available in Jamaica, think of how you can join us on the journey.

**The Most Honourable  
Andrew Michael Holness, ON, MP,  
Prime Minister of Jamaica**

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# Blueprint for growth: Special Economic Zones

**J**amaica has launched a project that could transform the economy in years to come and turn the Caribbean island into a logistics hub for the region.

Prof. Eric Deans, the Jamaica Special Economic Zone Authority ceo says, 'this project started three years ago and already we are seeing successfully the fruits of our ideas.'

It all began with the creation of the Special Economic Zones Act in 2016, establishing the Jamaica Special Economic Zone Authority (JSEZA) as the Agency of the Government of Jamaica responsible for facilitating the

Logistics Hub  
Initiative underway



Prof. Eric Deans

it regulates and supervises the SEZs through the administration, issuance of guidelines and directions to developers, occupants and zone users in relation to the SEZ Act; provides policy directions; attracts new and diverse investments in the SEZs and establishes efficient investor and business facilitation one-stop service.

'It was a challenging process. All the [legal] systems were outdated and we had to incorporate and develop a new regime, modern, resourceful and attractive to foreign and local investments,' explains Deans. 'The goal was, and is, to situate Jamaica as a major player in the global logistics chain, boost the economy through investments and job creation, and promote public-private-partnerships (PPP) including international

development of, and promoting investments in, Special Economic Zones (SEZs) in Jamaica.

JSEZA has a broad mandate:

organisations and training institutions.'

'Our models have been Singapore, Dubai and Rotterdam and we want to position Jamaica to become the 4th [Economic Zone] in the Western Hemisphere,' he continues. 'Is it an ambitious project? Yes, it is. But we are strategically located – an importance that dates since the 16th and 17th centuries. And we are only 32 miles from the shipping routes which have been enhanced with the Panama Canal expansion.'

JSEZA has identified 226 locations, mostly around Kingston and Montego Bay which has already a very large economic zone, comprising warehouses and distribution companies, created more than 20 years ago when the North American Free Trade Agreement (NAFTA) was enforced. Montego Bay Free Zone is the heart of Jamaica's Offshore Call Centres/Business Process Outsourcing (BPO) Industry with over 1,000,000sq ft of production and office space.

The first mention of Jamaica becoming a logistics hub goes back to 2008 and was incorporated in the Vision 2030 economic plan. Deans was in charge



of the committee that developed the idea and was the principal architect of Jamaica's Global Logistics Hub Initiative. He holds a PhD in marine policy from the University of Delaware and a Master of Science in maritime studies from the University of Wales.

During his professional career Deans has notched up a solid history in environmental stewardship, including serving as a member of the IMO Export Group. He is a former Jamaican representative to the IMO's Marine Environment Protection Committee and former National Coordinator for the Wider Caribbean Initiative on ship generated wastes.

Today, Jamaica is poised to grow exponentially from the development of SEZs, officials believe. It will host the World Free Zones Organisation's Annual Conference in 2021 that will gather 120 countries. The event will be held at the Montego Bay Convention Centre in St. James. 'It is like winning a bid for the Olympics,' noted Deans.

The Market Analysis and Master Plan for the Logistics Hub Initiative (LHI) completed in December 2017 highlights that the full development of the LHI will comprise approximately 3,800 hectares of development across the island, with a total order-of-magnitude cost of more than \$28bn (\$22bn in industrial investment) and creating as many as 87,400 direct jobs. The SEZ Authority notes that its location provides easy market access to Latin America and the Caribbean region, representing a consumer market of approximately 800m people.

The SEZs regime facilitates investments that will serve as a catalyst for driving Jamaica's industrial policy and facilitate linkages between global and domestic

markets by providing a convenient platform for local enterprises to participate in global supply chain networks. Even as new SEZ applications are being processed, transitioning of existing Free Zones into SEZs is currently underway. These include Kingston Free Zone, Jamaica International Free Zone, Montego Bay Free Zone, Garmex Free Zone, Barnett Tech Park, Cazoumar Free Zone, Portmore Informatics Park and Naggo Head Tech Park.

JSEZA awards developers the right to develop an SEZ by way of license-agreements or Master Concessions. Under a license agreement, developers can establish or manage an SEZ on land that is not vested in the SEZ Authority (private land). Under a Master Concession, developers can establish or manage an SEZ on land that has been vested in the Authority (private land). The term of a license agreement or Master Concession cannot exceed 50 years.

The JSEZA is the regulator which will create large townships around the industrial clusters. Caymanas SEZ, oriented to light manufacturing, is to be the flagship SEZ in Jamaica and the first large-scale zone – of three planned economic zones – developed under the new regime. The JISCO project, 45 minutes from Kingston, aims at developing aluminium manufacturing, bringing value-added to aluminium production. The third large project, Vernam, a former US Air Force base, is seen for the medium-term and not actively promoted yet. Each SEZ aims to develop a different sector with an industrial mix of Jamaican companies.

'One of the big impediments can be skilled labour but while other hubs rely on bringing outside people, we are implementing training programmes,'

says Deans. 'We have begun to send 52 engineers to China for a year to prepare for the [JISCO] project. We try to be very targeted in training programmes specific for logistics. Every SEZ of 40 hectares must have a training institute.'

'When we identify the key international companies [that could be interested in integrating our projects] we will visit their ceo's,' he explains. 'Our market analysis looked at 50 companies in pharmaceuticals, electronics, automobiles, agriculture-processing, medical devices, electricity and 3PLs, in the US, Canada, Japan, Singapore, France, Germany, the UK and the Middle East.'

### The Caymanas Special Economic Zone

The Caymanas Special Economic Zone (CSEZ) is an innovative Public-Private Partnership (PPP) to create a zone for warehousing, ICT/BPO, manufacturing, logistics, and other activities, on a 236-hectare greenfield site, strategically located near the Port of Kingston. The project takes advantage of the Port's unique position on global shipping routes between Asia and the Americas.

The CSEZ is the centrepiece of Jamaica's Global Logistics Hub Initiative, complementing recent PPPs for the nearby Kingston Transshipment Port, Kingston's Norman Manley International Airport, and new LNG and power generation facilities being developed in the vicinity.

An expected investment of \$221m will create a fully serviced site, with international-standard transport, telecommunications, energy and water networks, and environmentally sound management of wastewater and solid waste. A world-class private partner is sought to invest in, develop, and operate the CSEZ.

The project is expected to create approximately 70,000 jobs for managers, technicians, and other workers over its lifetime. The CSEZ will attract foreign and domestic investors and provide seamless, multimodal logistics (sea, air, road) to support a broad range of sectors.

The CSEZ will spearhead new industry trends, sponsor value-added production, and employ new technologies to put the CSEZ at the forefront of innovation





around the world. In addition, the zone will offer a one stop shop (OSS) with streamlined and fast-tracked services and after-care facilitation to its investors. With Customs on-site and available 24 hours, an investor will be able to do business how and when they like, within a secured environment.

The CSEZ is earmarked for the Caymanas Estate Development Area (CEDA), owned by the Urban Development Corporation (UDC) and Alexander Hamilton, which comprises 4,332 hectares (10,704 acres) of land and currently acts as a greenbelt between Kingston and St. Andrew to the east, Portmore to the south, and Spanish Town to the west. An area within this site has been set aside to construct an industrial project and township on 1,200 hectares (2,968 acres) adjacent to the Mandela Highway, and it is considered critical that the different land uses within the CEDA do not conflict or compete in any way.

The master plan for the site includes areas for serviced industrial land, and land for open space for pedestrian/ bike paths and parks. The site will offer amenities such as retail outlets, restaurants, conference facilities, business centres, commercial office space, post office, banks and pharmacies.

Caymanas represents an ideal location for an SEZ because it is situated on land that is flat, unencumbered, and requires minimal earthworks [cut and fill], lowering

the costs and enabling the project to be profitable in the long run, making it more attractive to a potential developer.

All industrial activities will be programmed within a single cluster to strengthen the industrial sectors and not compete with each other for demand. Hence, the 800-acre CHEC township will be incorporated into Phase One of the CSEZ project.

To help the CSEZ become successful, the CSEZ site is contiguous and large enough to support the future expansion requirements of the project. Because the CSEZ is Jamaica's flagship SEZ and is of national importance, the site is located and sized appropriately for growth.

Transport and logistics links to the CSEZ site are a strong feature. Currently, the CSEZ site is well served from the Mandela Highway, which is an advantage especially

since the highway has been expanded to six lanes.

Although there is a rail right-of-way to the south of the CSEZ lands connecting the CSEZ to Kingston port, the right-of-way could be used as a dedicated Customs controlled road and a bridge would need to be constructed. A dedicated road would physically divide an existing neighbourhood.

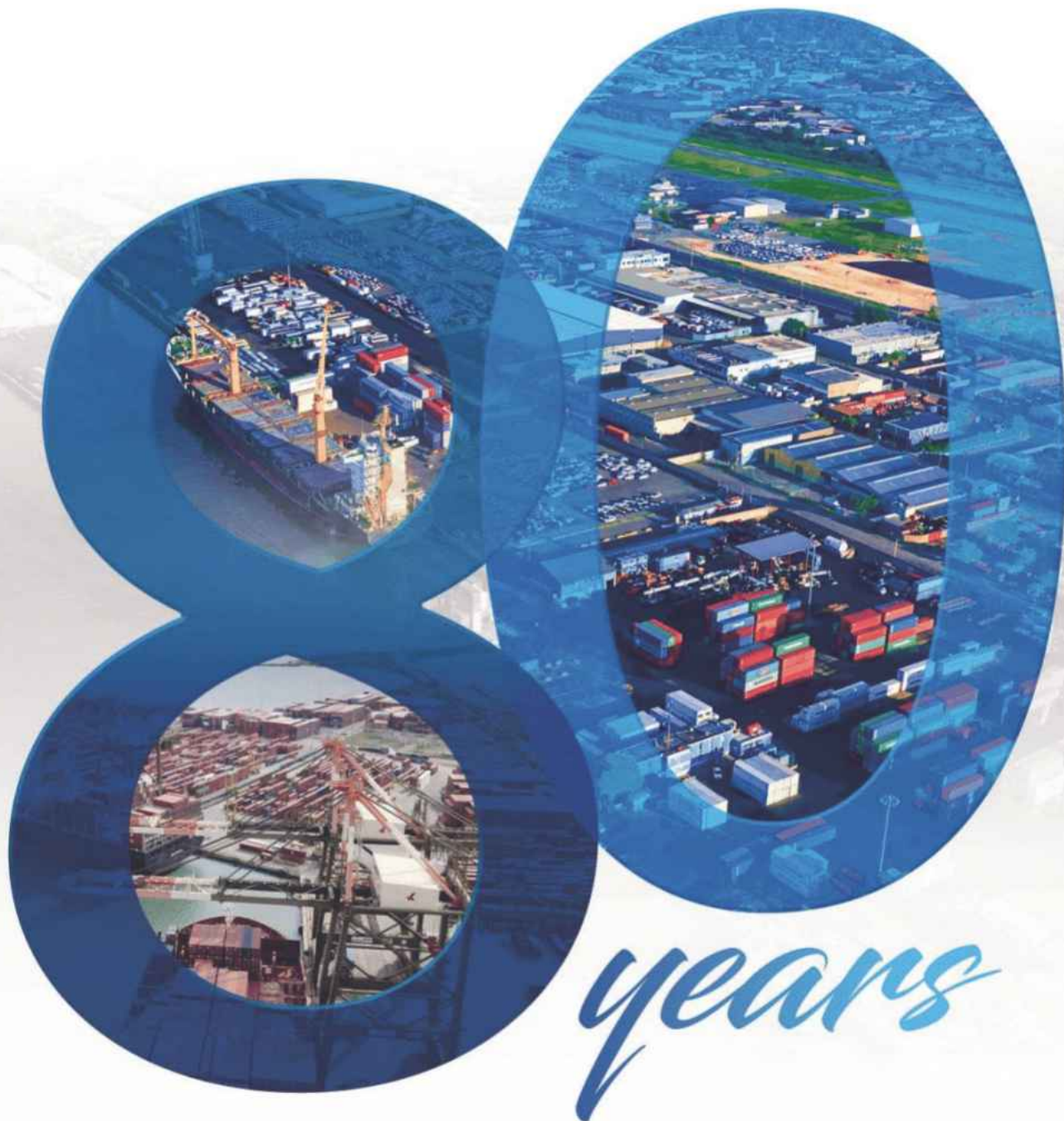
To build a strong brand for the CSEZ, the site was selected because it has prominent visibility by the thousands of motorists traversing the Mandela Highway daily. This highway frontage is premium and protected by the Government of Jamaica as this land will add value to the project. Also, access to the CSEZ is strategic since there is easy and direct entry from the Mandela Highway, the developer being required to determine any onsite or off-site infrastructure changes needed to optimise access.

Examples from other special economic zones around the world show that SEZ must have either dedicated power and water supply, or have guaranteed access to these utilities, say officials. For that reason, the Government of Jamaica has reconfirmed its commitment to prioritising the CSEZ project and ensuring that power and water are available to the site.

The CSEZ currently has power lines running through the site with two primary electricity transmission lines that provide power to the Greater Kingston and St. Catherine regions. These power lines will need to be relocated or buried to increase the usable size of the land.



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# JAMPRO on hand to offer assistance

**W**he JAMPRO (Jamaican Promotion Corporation) is an agency of the Government of Jamaica's Ministry of Industry, Commerce, Agriculture and Fisheries (MICAF), responsible for promoting business opportunities in export and inward investment.

'We are a facilitator for investment and export projects and guide investors through the necessary processes,' explains JAMPRO sales & promotion manager Don Gittens.



Don Gittens

'We offer them support in partnership with key government agencies and ministries, even after their investments are operational.'

'As a trade agency, we offer our clients a broad range of services from market intelligence to customised information,' he adds, 'helping local businesses to pursue their projects and successfully participate in international fairs.'

'We also prepare companies for exporting to new markets, procedures to execute before exporting and getting products into new markets. Our workshops have

facilitated approximately 600 prospective exporters to empower themselves with the knowledge needed to access new markets and identify export opportunities.'

JAMPRO follows the government guidelines in promoting the logistics sector, in particular the projects in Special Economic Zones and enhancing the business process outsourcing (BPO) centres which have given great relevance to Jamaica's services sector. Jamaica is the leading outsourcing location in the English-speaking Caribbean, with more than 60 companies offering call centres and BPO services.

Legendary Olympic champion Usain Bolt is a renowned figure in the world of international sport whose fame has attracted training developing sport companies. He is also an important investor in BPO activities himself, owning a large call centre in Montego Bay and another in Kingston, explains Gittens.

Bolt, still only in his early 30s, is already a successful businessman who has created a restaurant franchise – with two outlets in Jamaica, one in London and another in New York - and a line of sports clothing, all based in Jamaica. 'His name is fantastic advertising,' notes Gittens.

The BPO sector includes major global players, captives and providers, which

are both local and foreign-owned. A wide range of industries, including telecoms, banking, insurance and healthcare, are being serviced from Jamaica, while other BPOs include technology support, gaming, finance and accounting.

Services account for more than 70% of the country's GDP while tourism, with 20%, is also a high priority with the government for attracting foreign investments, which totalled \$775.5m in 2018. Of this total \$443m was in mining, \$100m in tourism activities and \$80.9m in agriculture production. The US was the single largest investor with \$246.1m, followed by Spain (\$130m), France (\$118m) and China (\$50m).

'The economic zones employ around 36,000 persons, mostly in the finance and accounting sectors, customers services and insurance,' Gittens says. Promoting investment in tourism ranks highly on JAMPRO's agenda with the current focus being on sustainability and developing off-the-beaten-track new ventures that combine agricultural businesses, local artisans and outdoors activities.

Jamaica will be hosting an international conference on Tourism Innovation, Resilience and Crisis Management next year in Montego Bay as well as an Energy conference in the first quarter of 2020 in Kingston as Jamaica is looking at developing renewable energy sources. Jamaica is ideally suited for using renewable energy sources such as wind and solar, and the government has committed to transitioning to 50% renewable energy by 2030.

Business opportunities in Jamaica are considered to be diverse and vast, ranging from medical marijuana exports of oil and cured plants to the creative industry. Jamaica's reputation as the cultural powerhouse of the Caribbean has positioned the island as a major producer of creative products for global consumption. World famous musicians, performers and writers have catalysed the formation of vibrant creative industries around music, craft, cuisine, and fashion, which in turn have generated small and medium-sized export companies, attracting local investors.

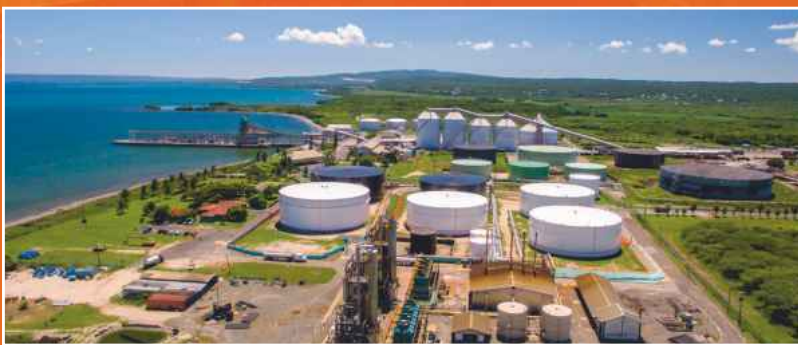


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Grantley Stephenson

regional business which has been growing, thanks to weekly services by feeder lines bringing cargo from Panama and/or Caucedo in the Dominican Republic.

# KWL: leading multi-purpose port

**Kingston Wharves Ltd (KWL) is the leading multi-purpose port of the Caribbean region. Incorporated in 1945, its modern growth began with addition of new deepwater berths 5-9 in the mid-1960s, making it Jamaica's first container transshipment terminal in 1972.**

Since 1972, expansion and modernisation at the award-winning port have continued, KWL receiving its Free Zone status in 2014 and opening its Total Logistics Facility and Global Auto Logistics Centre in 2018.

'KWL is listed on the Jamaica Stock Exchange since 1995, thus initiating the entry of Jamaican capital in the terminal making possible growth and development,' says Grantley Stephenson, who has been ceo since 2003 when Grace, Kennedy and Co ended almost 60 years of managing the facility.

The port company was first formed from a merger of the harbour-related interests of Jamaica Fruit and Shipping and Grace Kennedy, and has since expanded dramatically, now having nine berths and the capacity to host post-Panamax vessels.

Today, KWL runs a highly diversified operation which allows the terminal to handle a range of cargo types, spanning bulk, breakbulk, containers, automobiles and project cargo.

'Over the last five years, KWL has invested some \$50m in its operations to take advantage of the numerous global opportunities in shipping and logistics,' comments Stephenson, who was also

president of the Caribbean Shipping Association from 2012 to 2015.

'The terminal operations division remains the mainstay of our business, representing 74% of revenues in 2018, and accounting for 77% of the group's operating profits,' he says.

KWL's shipping clients include Seaboard Marine, Crowley, Maersk, Hapag-Lloyd and Cosco. Hoegh Autoliners, NYK, K Line and Mitsui are important partners for the ro-ro operations for which KWL acts as a transshipment port for the Caribbean, Central America, Surinam and Guyana.

'Kingston Wharves was established as a partnership, over the years we have forged a number of solid relationships throughout the industry,' affirms Stephenson.

Ro-ro operations covering both domestic and transshipment markets increased by 12% in 2018. While container handling remained steady last year, bulk and breakbulk cargo increased by 45% and 20% respectively. For the year to date until June 2019, KWL handled 102,000teu, 60,000 vehicles and 990,000 tonnes of domestic tonnage.

'We have plans to dredge Berths 6 and 7, and upgrade gradually other berths. We will call a tender, for those improvements, in the first half of 2020,' Stephenson explains, adding that Berths 8 and 9 had been modernised some years ago.

The channel has 15.25mtr depth and is adequate for future growth of the multipurpose operations focused on

The recent purchase of two Leibherr cranes brought the terminal's crane fleet to six mobile harbour cranes. In addition, in partnership with Jamaica Grains a state-of-the-art grain terminal was established, comprising two tower grain silos and conveyance system, 'a very promising new business,' according to Stephenson.

For Kingston Wharves, geographical position is all-important and an invaluable advantage. 'We are at a strategic location both regionally and domestically. KWL connects to 30 ports in the Caribbean, Latin America and North America. We are also in close proximity to Jamaica's highway and road network, and only 15 minutes from Kingston's Norman Manley international airport,' says Stephenson.

KWL's business is also technology enabled. The company utilises the Advantum Port Management application which powers its commercial, warehousing and cargo delivery processes, seamlessly interfacing with a Port Community System and by extension Custom's ASYCUDA. A modern online e-payment service and a mobile app which clients can utilise to pay for their shipments are other technology tools enhancing ease of business at Kingston Wharves.

KWL has also created a logistics branch, which represented 26% of its revenues in 2018, as it sees its future growth linked to a seamless synergy between its terminal operations activities and the provision of 3PL and 4PL logistics services.

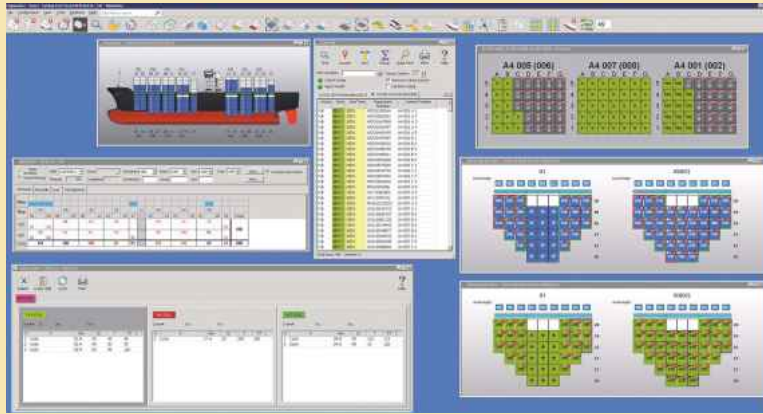
A number of simultaneous developments suggests Kingston Wharves could become an ever-greater logistics player in the future.

Firstly, Jamaica is well poised for developing into a transshipment and logistics hub through a number of Special

## Tideworks Terminal Operating System solutions

In 2003 Kingston Wharves Ltd (KWL) first implemented Tideworks' TOS (Terminal Operating System) solutions, to upgrade terminal operations that up until that point were driven primarily by paper processes. Although KWL was already managing billing and tracking electronically, former systems did not provide the planning, inventory management and gate operational control that was desired.

Since 2003, KWL has been leveraging three key components of the Tideworks solutions: the Mainsail® core TOS, which effectively manages terminal and gate operations and provides a library of standard reports; the Forecast® web portal, which helps terminals communicate more easily with shipping lines and other supply chain stakeholders; and the Spinnaker Planning Management



System®, which provides graphically-rich vessel, yard and rail planning tools to efficiently plan containers and ensure accurate inventory.

Tideworks was selected because of its ability to rapidly and cost-effectively implement a comprehensive systems solution that met the requirements of KWL's container business. The implementation period was just five months, which included project

management, user training, support during the 'go-live' process, and the provision of several key interfaces to KWL's accounting and wharfage billing systems.

Additionally, to ensure KWL could make the best use of the new system, Tideworks completed a thorough business process review before beginning the system implementation. Coupled with a successful system implementation, this resulted in a more productive terminal that now offers an enhanced level of service to KWL's customers.

'KWL is one of our longest standing customers, and we are very proud to be their technology partner. They are a great group who has continually pushed us over the years to be better,' says Thomas Rucker, president of Tideworks.

Economic Zones (SEZs) scattered across the country (see earlier article). The Jamaican Government's logistics hub initiative is aimed at building a competitive business environment and supporting growth-stimulating economic activities that will accelerate development and generate significant revenue for the country.

Kingston Wharves is in the process of making the transition from a Free Zone to the SEZ framework. 'The process has not been without challenges,' says the ceo, but should be completed shortly. Advantages of joining the new regime include reduced income tax and other incentives for companies to re-invest in their enterprises and undertake additional capital investment projects.

Additionally, KWL has built a 160,000sq ft Total Logistics Facility (TLF), a state-of-the-art logistics complex, comprising administrative offices, commercial operations, warehouse and customs processing. Here all kinds of value-added operations such as product assembling and labelling, order picking and packing, customised freight transportation and distribution services are carried out. 'The TLF has also underpinned our logistics suite services offered to NVOCC clients,' points out Stephenson.

For several decades, Kingston Wharves has been the leading auto transshipment hub in the Caribbean, and in 2009 the port became the regional hub for Höegh Autoliners. In expanding its automobile

operations, KWL established an 18-acre Global Auto Logistics Centre (GALC) with additional yard capacity for over 5,000 units, bringing the total capacity for vehicles to over 10,000CEU. KWL is also utilising a motor vehicle management system, which facilitates more efficient vehicle identification and location. Some 100,000 vehicle moves were carried out through the KWL Terminal in 2018, a direct result of these strategic partnerships and investments.

On KWL's future improvement agenda is the \$30m construction of a 300,000sq ft Modular Warehouse Complex (MWC), located in the future SEZ close to the port which would provide regional and global distributors and manufacturers with both dry, ambient and temperature-controlled warehousing solutions on services, lease or joint venture partnership basis. The MWC will offer energy-efficient freight handling facilities, easy access to loading bays, and access to secure and organised pallet racked storage.

The facility is expected to become an integral part of the supply chain management for global and local manufacturers, retailers and other entrepreneurs.

KWL's Global Auto Logistics Centre







# West Indies Petroleum's key logistics hub role

**W**hat did a banker, who had recently returned to Jamaica, and three other businessmen specialised in gasoline distribution, bunkering, commodities and transport have in common? Audacity, creativity and market intuition about the fuel sector where they discovered a niche to be filled. And when they came together and became partners, the result was a bunker company, founded in 2012, which has grown constantly ever since.

Today, West Indies Petroleum (WIP) is the biggest and only all-Jamaican-owned company in the bunker market. In less than six years, after starting operations with only one barge in November 2013, WIP has grown to current position of offering more than 830,000bbl of storage – making it the second most important owner of fuel storage on the island, behind Petrojam – and leader in bunker sales.

Since Jamaica has a captive market of cruise ships going to Montego Bay and Ocho Rios, in the northwest of the country, the company thought that there was a demand for fuels, even though delivery had to be made by trucks. The decision was made and 'we began to supply fuels,' relates Charles Chambers, WIP ceo, the first vessel being one that belonged to Louis Cruises.

Chambers, 45, is a modern ceo. Nothing fancy in his office, only a framed 2017

Jamaican Polo team t-shirt showing his love of the sport which he practices with enthusiasm.

A finance graduate from the Wharton School of business, Chambers becomes inspired when talking quickfire about the economy and Jamaica's potential.

'A place of incredible promise which has not achieved its potential because of politics...It appears to me that the current Prime Minister does have a valid evaluation of stability...He is pro-business...There are lots of present opportunities... Both [opposition and Government] parties are actually pro-business... The accountability factor has been very strong [to help reviving the economy]... Tourism is all-inclusive-oriented but with a new focus, complemented by 'cultural tourism', it might double the 4m tourists per year in the medium term...There are big changes going on...incredible road infrastructure...[we're living] an interesting moment because we are going to see big [economic] growth.'

WIP sees itself as an important player in Jamaica's logistic hub initiative, which very much ties in with the company's founding vision.

'When we first approached the cruise lines, they were quite supportive. They told us, though, to do something else other than refurbishing the existing fuel tanks and suggested we re-organise our logistics.

That became our main focus. In 2014, we took leases on facilities to be able to import [fuels] and we acquired property in Kingston, Montego Bay and Ocho Rios.'



Charles Chambers

It was to prove a perfect opportunity to meet the region's growing demand for marine re-fuelling, at the same time as positioning WIP as a contributor to Jamaica's emerging role of global logistics centre.

'In June 2016, we purchased a 600,000bbl fuel storage facility, South Terminal, located at Port Esquivel, on the south coast of Jamaica, 20 miles west of Kingston,' Chambers continues. 'The terminal, with 11.5mtr draught, had been built by Jamaica Broilers (JB) which imported Brazilian ethanol but the company wanted to exit the ethanol market and it was a good opportunity. We bought it for \$22.5m and re-furbished it, signing in 2017 a three-year contract with Castleton Commodities for the supply of fuels.'

The deal with Castleton has enabled WIP to supply fuel regionally as well as offer low-cost marine refuelling for international cruise and container shipping customers.

'In addition, we have storage of 65,000bbl tanks on the north coast at the Ocho Rios Cruise Terminal and a further storage capacity of 250,000bbl over five

# Jamaica

## Special Economic Zones

The next place you **invest**,  
must be in *Paradise*

Dictionary

Jamaica

**Jamaica**  
/jə-mā'kə/

*noun*

noun: Jamaica; synonym: Logistics hub of the Caribbean

1. Jamaica the place of choice to live, work, raise families and do business.  
"We will invest in Jamaica."





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Refuelling for cruiseships available at Montego Bay

Container vessels are a challenging market at present because of their irregular calls and tight schedules, says Chambers, but are nevertheless an area of focus because 'we think this volume is going to expand.'

On WIP's agenda is to improve the fleet and bring higher volumes to Port Esquivel by expanding the terminal's storage and therefore its economies of scale.

tugs and barges, which give us a total storage in excess of 900,000bbl,' explains Chambers. 'So far, we have invested around \$50m-\$55m... because we take a long view on Jamaica.

'We deliver bunker services within Jamaican waters 24 hours a day to all types of vessels by barge at inner anchorage in Kingston harbour and by truck to all other ports of Jamaica. We are currently in the process of purchasing supplementary vessels which will serve the island of Jamaica... We also supply a network of gas stations on-island with a fleet of truck tankers.

'Quality, safety and economic sense are

the basics of our organisation. Every customer wants reliability and functional equipment. We were selling 20,000mt per month in 2012-13 and have increased probably to around 30,000mt to 40,000mt per month today.'

WIP has ensured full compliance with all local and international marine specifications and requirements, with all products meeting the applicable ISO 8217/2010 standards and complying with MARPOL 73/78, Annex VI. All its vessels and ventures are adequately insured and in class. Furthermore, WIP's supply agreement with the local Petrojam refinery guarantees customers' quantity and quality certification.

'WIP has made a very bold step which has signalled a move to diversify Jamaica's industrial base while attracting large-scale commodity traders,' the head of the Jamaica Special Economic Zone Authority (JSEZA) and architect of the logistics hub, Eric Deans, told Jamaican media recently. 'Having toured the WIP facilities, it is evident that the company adheres to very high standards of operation and it is impressive what they have done and will continue to do.'

'For us at WIP, the most important mission is offering better service and better quality,' concludes Chambers, confirming WIP's motto: 'We fuel your vessel with accuracy, efficiency and integrity.'

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# Shipping Association of Jamaica promotes unity



Capt. Sibrandt Duhn



Trevor Riley

**A**spirately 80-year-old, the Shipping Association of Jamaica (SAJ) was first formed at the end of the 1930s, a time when the labour situation on Jamaica's wharves was highly volatile.

Unrest by trade unions and workers had brought Kingston to a standstill by halting all port activity, negatively impacting the national economy, so a group of concerned shipping industry executives decided they need to organise as well to try and bring some order.

The result was the establishment of SAJ in January 1939. In its early years it counted some 10 member companies, run by such notables as Charles Edward Johnston, Luis Frederick Kennedy, Capt. Sibrandt Duhn List and Thomas Bradshaw, all early pioneers and architects of SAJ.

The Association was not restricted to Jamaican nationals and had very clear goals, including a commitment to improve conditions of employment, establish uniformity of rates paid to labour on wharves and ships, as well as to ensure that labourers give a fair day's work in return for a fair day's pay.

SAJ thereby brought a new kind of institution to the island, becoming the chief negotiator of all wharfing interests in Jamaica and setting examples for good industrial practices. 'By the end of the last century, the industrial climate of the Kingston waterfront was regarded amongst the best anywhere,' says SAJ Group's ceo Trevor Riley.

Trevor Riley joined SAJ in 2003, having worked previously in banking, tourism and media. With a solid and diverse business, marketing and media background, he also supervises a group of companies associated with SAJ.

The 80-member Association plays an important role in Jamaica's maritime sector as it includes representatives from the terminal operators, stevedoring contractors and shipping agents, working with Government agencies and the private sector to promote sustainability and growth in the shipping industry, Riley explains. Registered as a trade union, one of its primary functions is to manage the daily supply of certain categories of labour at the port of Kingston.

But SAJ's capacities do not stop at official duties; its involvement in training programmes has been key to the improvement of the industry's management and work force, enhancing the quality of industrial relations and becoming a reference for the modernisation in the ports.

In the 1940s, the Association became an employer itself, creating an internal labour hire organisation, training recruits and providing ports with personnel. 'But in 1998, changes in the ports resulting from modernisation of most operational systems demanded that the SAJ also changes its relationship as an employer to providing mainly stevedoring labour,' explains Riley.

SAJ also expanded and created a company, Port Computer Services Limited, which was at the forefront of developing and deploying software relevant to the shipping business. That company continues today under new ownership.

One important role of SAJ is to consult with government and other bodies regarding legislation and issues related to shipping affairs. 'We have been at the forefront of modernisation of our ports,' says Riley with justifiable pride.

Asked about the possible automation of Jamaican ports, the ceo responds that ports must always evolve but that the solutions the adopt are based on trade-offs. 'Automation will come when it makes economic sense,' he says.

Like any other business, terminal operators will have to decide the point at which the cost of labour becomes prohibitive in relation to the cost of automation, he explains, or at which efficiency gained from automation supersedes its cost in comparison to human efforts.

Currently, SAJ's E-Labour system has revolutionised the recruitment and deployment of port workers. Once the system receives labour demand notices from the port, it appropriately assigns qualified workers. Specifically, the system accurately assigns and deploys more than 250 port workers across three shifts on a daily basis.

E-Labour capitalises on both the use of technology which minimises the input of a heavily staffed human resources



management framework, and the up-skilling of workers. Training is an essential pillar of the SAJ's strategy to continuously equip port workers with new skills. Therefore, the association is a HEART Trust/NTA Technical Vocational Education and Training (TVET) Certified training institution.

SAJ is now the third largest employer at the Port of Kingston, as both KFTL and Kingston Wharves Ltd have opted to employ most of the workers at their facilities, relying on SAJ to provide a supplementary force.

In addition, SAJ established in 1994 a Canine Division to help port operators in fighting drug trafficking with professional anti-narcotic and drug detection through a team of well-trained handlers and

their dogs. The service is available to the Association's members in the port community including Port Bustamante and environs, the Port of Montego Bay and other ports.

'Over the long years of our existence, we have also engaged in other ventures such as pilotage, IT solutions and labour relations,' adds Riley.

SAJ is governed by a 13-member board of directors, known as the Managing Committee (MC), the highest decision-making body, which is elected at the agm. The Committee consists of the president, vice-president, immediate past president and eight members of the SAJ as well as the Association Group ceo. It sets policy and has responsibility and authority over the affairs of SAJ, including the approval of

applications for membership.

At the moment, SAJ's president is Charles Johnston who has been in the shipping and produce-export business since 1964 and a member of the MC with few interruptions since 1976. He is the executive chairman of Jamaica Fruit & Shipping Company and its subsidiaries and sits on the boards of a number of shipping and export companies.

SAJ's vice-president is also a well-known figure of Jamaica's shipping industry as Grantley Stephenson is currently the ceo of Kingston Wharves Limited (KWL) and also a past president of SAJ. The immediate past president is Denise Lyn Fatt, who was the body's first female president and has also served as chairman of the Agents' Committee of the SAJ.

## Seaboard Jamaica celebrates 20 years

Seaboard Marine is a premier ocean transportation company providing direct, regular service between North America, the Caribbean Basin, Central and South America. A wholly owned subsidiary of Seaboard Corp, it has a fleet of over 25 vessels serving nearly 40 ports and offices in more than 30 countries.

Jamaica serves as regional hub for Seaboard, which also has a presence in the Dominican Republic, Cartagena (Colombia) and Panama, explains Seaboard Jamaica ceo Corah-Ann Robertson-Sylvester.

Seaboard Jamaica opened its doors as a separate entity in October 1999, and has just celebrated its 20th anniversary, today employing some 100 persons on the island.

'We use Kingston Wharves Ltd as our fixed hub since it is a very efficient terminal and customer-friendly,' continues



Corah-Ann Robertson-Sylvester

Robertson-Sylvester, referring to the multipurpose port whose namesake operator has invested some \$50m in infrastructure and equipment over the last three

years. 'We realise how very receptive they are.'

Seaboard also has an office in Montego Bay, as well as a dedicated ro-ro berth and a 60,000sq ft bonded warehouse inside Montego Free Zone, she adds.

From these facilities the company operates an exclusive cargo/ro-ro service covering Kingston, Montego Bay, Kingston, Cayman Islands and back. It is the only service calling Cayman Islands and as such is very successful,

used by large carriers as a feeder to connect the British Overseas Territory with Europe, China, South America, Mexico and beyond.

Prospects for trade remain 'satisfactory,' says the ceo, mindful that times of global economic uncertainty can always have a slowdown effect on trade, impacting the Caribbean as well.

Besides having been with Seaboard Marine for the past 25 years, Robertson-Sylvester is a distinguished maritime personality in her own right, having been the first female president of the Caribbean Shipping Association when elected in 2003, before re-election in 2005. She has also been an active member of the Shipping Association of Jamaica and chair of the Jamaica Maritime Authority, where she was appointed by two successive Jamaican ministers of transport and re-appointed in 2016.



## JP Group's local roots, global ambitions

Founding assembly of JP Group, 1929

Bananas, Tortuga rum cakes and crispy cassava snacks are some examples of renowned Jamaican delicacies but only a few will notice that they are produced and labelled by Jamaica Producers (JP) Group, one of the largest industrial groups in the Caribbean island whose inception goes back almost a century ago.

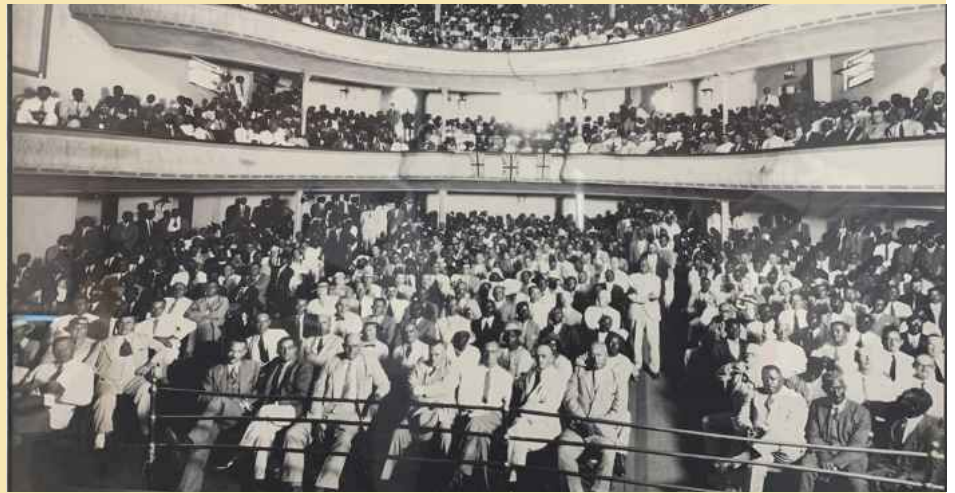
The main activities of the Group are extremely diverse although all sectors are connected to production and transport: port terminal operations; logistics; cultivation, marketing and distribution of fresh produce; food and juice manufacturing; land management and the holding of investments.

'We are Jamaican-owned but our aspirations are relentlessly global,' says JP Group ceo Jeffrey Hall. 'Our shareholders want us to connect them with the world. We do this well and with purpose. Our mindset is at once inclusive and expansive.'



Jeffrey Hall

The Group's team spans eight countries in 13 locations and employs more



than 1,000 people. Its origins go back to 1929 when 6,000 banana growers got together to form the Jamaican Producers Association, which later changed its name to JP Group in the 1990s. Today, bananas still represent 2.5% of the Group revenues; other sectors like juice business, manufactured in the Netherlands, tropical food snacks and bakery were developed later.

'Diversification took momentum in the last 10 years and we began to significantly invest in shipping services and logistics ventures and acquiring stock in Kingston Wharves, to design an integrated shipping business,'

explains Hall. 'There were very exciting opportunities and we took them. We believe we have to adjust to global models to continue [expanding].'

'We see challenges and opportunities to use Kingston as a hub for trade. Jamaica has good trading and investment relations with the US and China, offering great opening for our products. The country has a dynamic and diverse services policy, with focus on agricultural business though with an increasing shifting to a service and industrial economy. And Jamaican capitals are well aware of it and investing locally too,' he adds.

## Jamaica Broilers Group (JBG)

Jamaica Broilers Group (JBG) is engaged in the production and distribution of poultry products, animal feeds, and agricultural items. Based in Jamaica, it also has operations in Haiti and the US.

JBG produces approximately 260,000mt of chicken feed in its feed mill in Port Esquivel which is sold to local chicken farmers under the brand name Hi-Pro. Once the chickens reach maturity, JBG receives them for processing in its factory in St Catherine. The company is the leading producer of chicken meat in Jamaica, the most popular brand being 'The Best Dressed Chicken'.

For more than 20 years the supply requirements of JBG have been handled by Intership Navigation Co, the Cyprus-based dry cargo arm of the German Hartmann Group – whose principal Capt. Alfred Hartmann is also president of the German Shipowners' Association.



All smiles – Capt. Hartmann with JBG team

Through its commercial arm United Bulk Carriers (UBC) based in Philadelphia, Intership carries chicken feed from New Orleans to Port Esquivel in its fleet of 25 handysize bulk carriers, which trade mainly in the Caribbean, US Gulf, North Coast South America and Central America, carrying all kinds of minor bulk cargoes such as grains, fertilizer, petcoke and coal. Intership also sponsors the Kingston-based Caribbean Maritime University.



UBC vessel unloading





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# Lannaman & Morris: from cruise to logistics



Cruise terminal  
at Ocho Rios

**L**annaman & Morris Shipping was established by Vance Lannaman and Ainsley Morris in 1973 before being purchased by Harry Maragh, its present chairman and ceo, in March 1997.

'It turned out to be a good investment,' says Maragh, whose ancestors came from Mumbai, India. During his time in charge he has overseen the company's diversification into a wide range of commercial interests, including port and terminal management, logistics and supply chain management, and international transport and management consultancy.

The legacy Lannaman & Morris shipping agency is one of Jamaica's best known and most respected maritime companies which has been at the forefront of the agency business – including for cruise lines – during nearly half a century. During that time it has represented some major names in both merchant and cruise shipping, such as Evergreen Line, Norwegian Cruise Line, Carnival Cruise Line and Seafreight, a Crowley company.

The business 'has grown exponentially both in the principals we represent and

the services we offer,' Maragh says, 'which now include: liner and tramp husbandry agents, freight forwarding, cargo consolidation, warehousing, bunker brokerage, equipment rental, project management, customs clearance, port management and chartering agents.'

Today the company represents 70% of all cruise lines visiting Jamaica and 15% of cargo tonnage entering the island's ports. It has grown from employing 26 people 30 years ago to its current 107 employees, and has offices in Montego Bay and Ocho Rios.

Cruise tourism to Jamaica has increased dramatically over the last three years, he explains, with the tally of cruiseship calls having risen from around 80 annually to some 300 in 2018-2019 – 'mainly from Carnival and its subsidiaries, NCL, Crystal, Saga and Fred. Olsen.'

As well as popular Montego Bay and Ocho Rios, Jamaica now offers the new destination of Port Royal, located not far from Kingston. The old Spanish town became notorious as a hangout for pirates employed to defend the island during British colonial rule, but was destroyed by an earthquake and ensuing tsunami



Harry Maragh

in the late 17th century; it has now been restored and its ruins rebuilt, together with a museum and floating dock set to receive its first cruise vessel in January 2020.

'The shipping agency business as such is diminishing, so we had to look at viable opportunities and turn them into new ventures,' Maragh continues. 'We decided to go into warehousing and primary logistics, storing and delivering with in bond-facilities. We also invested heavily in Kingston Wharves, through Jamaica's Stock Exchange.'

In the logistics area, Lannaman & Morris has created five 80,000sq ft warehouses, all in the port area, and bought seven trucks. 'It was a good decision,' feels Maragh, 'because we do a lot of logistics work for the European cruise lines. They send us supplies for their vessels to Kingston and we transport them to Montego Bay and/or Ocho Rios. They are demanding but we provide them with good service.'

The company also manages the Ocho Rios Cruise Ship Terminal on behalf of the Port Authority of Jamaica and the Government. Ocho Rios has been ranked among leading international cruise facilities, and today is the most profitable and efficient terminal in Jamaica.

Maragh believes the company owes its success, in large part, to its strong customer base and excellent team work. 'We couldn't have reached this mark without the loyal support of our clients over the years,' he says, 'but even more so, this is a marked achievement for the team, our staff members who have dedicated themselves to improving service delivery, upholding our strong values and building the company into one of the best in this part of the world. For this we say "thank you".'

# Maritime Authority of Jamaica passes muster

IMO secretary-general Kitack Lim inspects cadets



RAdm Peter Brady

the region, where there is such a high dependence on safe and environmentally sound maritime transportation in all its forms, and, equally, a

need to have highly trained and qualified professionals engaged in the diverse activities of the blue economy,' Brady said at the time.

**J**amaica's shipping history stretches a long way back, and for nearly all last century the island's maritime affairs were governed by the UK Merchant Shipping Act of 1894. Then, after some 20 years in the making, the country's own Shipping Act was introduced in 1998, and the Maritime Authority of Jamaica (MAJ) was duly established under the new legislation on January 1 the following year.

The new Authority was tasked with developing the island's shipping and regulating matters pertaining to merchant ships and seafarers.

A key driver for introduction of the Shipping Act had been the country's need to demonstrate it had the legal framework necessary for implementing the International Maritime Organization's revised STCW (Standards of Training, Certification and Watchkeeping for seafarers) Convention, explains Rear Admiral (ret'd) Peter Brady, director general of the Maritime Authority of Jamaica, thereby allowing its qualification for the IMO White List of approved flag administrations.

In fact, the MAJ has been a highly proactive force on standards within the IMO ever since, as witnessed by the fact that RAdm Brady himself has served as long-time chairman of the international

body's STW (Standards of Training and Watchkeeping) sub-committee.

In October 2000, the MAJ launched Jamaica Ship Registry as a platform for increasing the country's profile in the international shipping community and a catalyst for investment in other maritime activities and promote Jamaica as a maritime centre.

'We want to be recognised as a responsible maritime administration with a Ship Registry of the very highest standard, and not do it at the expense of quality,' states Brady.

A well-respected figure, Brady was also re-appointed to the board of governors of the World Maritime University (WMU) in Malmo, Sweden, in 2018. The appointment was made by IMO secretary-general Kitack Lim and will run until February 2021.

'This appointment highlights Jamaica's recognition and status among states of

The Jamaica Ship Registry (JSR) is small and mostly comprises vessels employed on cabotage trade and foreign flag vessels engaged in local trade, as well as large yachts. Some of the JSR vessels are owned by Europe-based companies trading globally.

Through the local trade regime, the MAJ ensures that foreign vessels conducting commercial activities in Jamaican waters meet national and international requirements for maritime safety, security and pollution prevention. Vessels which are issued with local trade certificates include tankers, barges, cable laying vessels and dredges.

There are over 1,200 vessels operating locally, including many engaged in water-sports, chartering, fishing activities, pilot boats, and other marine commercial support activities. 'We conduct inspections annually on local vessels and on approximately 15% of foreign vessel calling at Jamaican ports, under the Caribbean Memorandum of Understanding (CMoU) on port state control regime,' informs Brady. Jamaica



Adm. Peter Brady receiving Seatrade Award



currently hosts the Secretariat for the CMOU.

The Caribbean Maritime Institute (CMI) located in Jamaica, is the only IMO-approved training institution in the English-speaking Caribbean for the training of officers and carries out training on behalf of most countries in the Caribbean. The MAJ works closely with the CMI, to ensure seafarers trained at the Institute are of the highest quality. In this regard, the MAJ approves the syllabus and examines candidates for the issue of certificates of competency. It also carries out monitoring of the delivery of training and periodic audits of the CMI in this regard.

In 2015, Rear Admiral Brady was winner of the Seatrade IMO-Themed Award for Maritime Education and Training, with the director general of the MAJ travelling to London to receive the trophy.

Currently, Jamaica is a member of the 40-member IMO Council – under Category C comprising countries ‘which have special interests in maritime transport or navigation and whose

election to the IMO Council will ensure the representation of all major geographic areas of the world’ – and was successfully re-elected in December 2019.

The country is also a strong supporter of IMO’s gender equality campaign through its endorsement of various initiatives seeking increased integration of women in the shipping industry. ‘We actively support the Women in Maritime Association Caribbean (WiMAC) – the regional chapter of the IMO’s women’s movement – whose mandate is to increase the participation and contribution of women to the maritime industry and provide mentorship and other support to female seafarers,’ explains the MAJ director general. There are seven chapters of WiMC in the world and ‘we host the secretariat for the Caribbean region,’ he points out.

The election of MAJ’s deputy director general, Claudia Grant, as chairman of the Sub Committee on Implementation of IMO Instruments (III) during the 5th session of the subcommittee held in September 2018, in London and her re-election in 2019 brought further recognition to Jamaica and

the MAJ, showing Jamaica’s commitment to implementation of the IMO conventions and regulations.

Ms Grant is an experienced maritime professional who has been involved in the maritime industry in the Caribbean for nearly three decades. She was awarded outstanding alumnae of the World Maritime University of Malmo and has served as president of WiMAC since the association’s inception in 2015. WiMAC was launched in April 2015 under the auspices of the IMO with membership from 16 Caribbean countries.

In conclusion, the MAJ says its vision is to ‘elevate Jamaica’s maritime status to world standards, through the provision of quality client-focused services, by making the best use of appropriate technology and employing highly trained and motivated staff.’ It pledges to ‘pursue the development of shipping and provide quality service to the Jamaican and international maritime industry, while promoting high standards of maritime competence, safety, security and protection of the marine environment.’

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# CSA faces climate and investment challenges

**T**he Caribbean Shipping Association (CSA) was established in 1971 to facilitate development of an efficient, viable Caribbean and Latin American shipping industry. The Association has since become a major regional forum addressing issues of growth and development of Caribbean and Latin American shipping.

Like most associations, CSA's primary function is to promote and facilitate the exchange of information and ideas essential to development, and assist members in improving efficiency, production and output. 'Our priority concern, at CSA, is the training and development of all stakeholders in the Caribbean and Latin American shipping industry,' says CSA president Juan Carlos Croston.

Juan Carlos Croston, 43, was elected president of the Caribbean Shipping Association's General Council, the association's governing body, in 2017 and was re-elected for another two-year period in 2019. A renowned figure of the regional shipping world, Croston is also vice president Marketing & Corporate Affairs of Manzanillo International Terminal-Panama (MIT-Panama).

The backbone of the CSA is composed of national shipping associations throughout

the Caribbean region and key shipping stakeholders: shipping agents, port and terminal owners and operators, shipowners and operators, and logistics and ancillary service providers.

Because the Caribbean ports are part of a delicate island ecosystem, threatened by climate change and extreme weather incidents, 'CSA has partnered with the Inter-American Committee on Ports (CIP) of the Organisation of American States (OAS) to start a project, called 'Improved Disaster Risk Management for Ports in the Caribbean', with the objective of contributing to reduce the impact of natural and man-made hazards on port operations by strengthening disaster risk management capabilities in Port and Maritime Authorities of the Caribbean,' says Croston.

'The project is structured in four phases and includes i) an assessment of specific vulnerabilities, ii) drafting a model operational procedure plan that each port can tailor to its own needs, iii) training key stakeholders on implementation (including governance and business continuity), and iv) carrying out exercises and simulations to identify improvement areas in order to be incorporated into the draft plan.'

The project, which is currently under evaluation by OAS for approval to seek funding, 'welcomes interested parties from both public and private sector to provide

continuous support, expertise and possible funding,' he adds.

For a region where tourism is vital to the local economies and where almost 3m jobs depend directly or indirectly on the sector, there seems to be little awareness about environmental protection in the Caribbean, notes Croston.

'For that reason, CSA has partnered with the Caribbean Marine Environmental Protection Association (CARIBMEPA) to consolidate marine environmental issues and actions in the Caribbean and to engage industry, regulators, governments, conservation groups, educators and the general public in promoting and protecting the environment,' he explains.

The key identified steps include supporting the full implementation of MARPOL (the International Convention for the Prevention of Pollution from Ships) through the development of maritime safety, security and environment training capacities within regional institutions and support for appropriate national maritime legislation. However, unfortunately only 25% of countries in the wider Caribbean region have to date implemented MARPOL, Croston notes.



Juan Carlos Croston



'It is also necessary to build capacity for managing waste streams for the region, public education about protecting the marine environment, establishment of a MARPOL Training Academy in the Caribbean, and the identification and risk assessment of the nearly 300 (mostly WWII) shipwrecks. CSA, in the person of Capt. Rawle Baddaloo, is proud to co-lead this great initiative, along with Ms Carleen Lyden Walker, CARIBMEPA's founder and leader.'

'Resilience will create challenges and opportunities for many players in the region,' estimates the CSA president. 'We have seen the effects of more acute weather patterns, in particular hurricanes, in our Caribbean territories so having sound, up-to-date contingency plans that

link vital government and private players in each location is critical. Also, the structural changes affecting our industry can only be dealt with by a trained, motivated labour force. Here, the need to update and improve training plans is more important than ever.'

Increasing weather turbulence is not the only development that the Caribbean region has to combat. Competition from the regional ports in the Gulf of Mexico, Central America and Latin America has shown the need for upgrading the facilities of many a port in the Caribbean, especially against a background of deteriorating economies and poor public finances and their knock-on effect, on government-run ports in particular.

'While education and health should take

public investment priorities, long-term performance of small territories is linked to the capacity of such territories to trade with the rest of the world,' points out Croston. 'And good seaport infrastructure [and processes] is vital to that end.'

'We have seen, in the last couple of years, interest from regional governments to attract foreign direct investment from private firms and countries, while we have also seen some concern from local private companies regarding the conditions offered to secure funds,' he adds. 'Dialogue and openness are vital so that the needs of all players (investors, local governments and private sector) are listened to whereas funds needed for investments flow in, as fast as possible.'



## Tourism industry promotes land of warmth and beauty

Over the past three years, the Jamaican Ministry of Tourism has been following a strategy dubbed 'five by five by five' – achieving an extra 5m tourist arrivals over five years earning \$5bn in revenues. Just for good measure the sector also provides one in five jobs on the island.

'We see tourism as the industry of the future,' says Jamaica's minister of Tourism, Edmund Bartlett. 'We are quickly closing in on [growth of] five million visitors in five years, and Jamaica's tourism earnings are growing at a faster rate than arrivals.'

In Jamaica the tourism industry includes both cruise and airlift arrivals, currently accounting for some 45% and 55% of visitors respectively. In 2018 there were a total 1.84m cruise guests that arrived in Jamaica, whilst around 2.4m visitors arrived by air.

The country has also identified 'Five Pillars of Tourism Growth', explains Joy

Roberts, executive director of Jamaica Vacations (JAMVAC). These include: tapping into new markets, developing new products, promoting investment, building new partnerships, and developing human capital. The pillars in turn support the island's five main 'Tourism Networks', she adds: sports and entertainment, gastronomy, health and wellness, knowledge, and shopping.

'We have looked at the passion of our visitors and have responded,' says Roberts. 'Many of our visitors now want to have the experience of locals. Jamaica is known to have beautiful flora and fauna, great food, good music and varied activities that enhance the experience.'

For the past three years, the Government has been offering loans on beneficial terms to companies or individuals wishing to develop inward tourism initiatives. This has allowed a diversification of the types of product offered and the range

of players, expanding the offering to varied experience such as trekking, ecology, visits to rum factories or coffee plantations, and more. Innovation has been at a premium, rewarded through the ministry's Tourism Enhancement Fund.

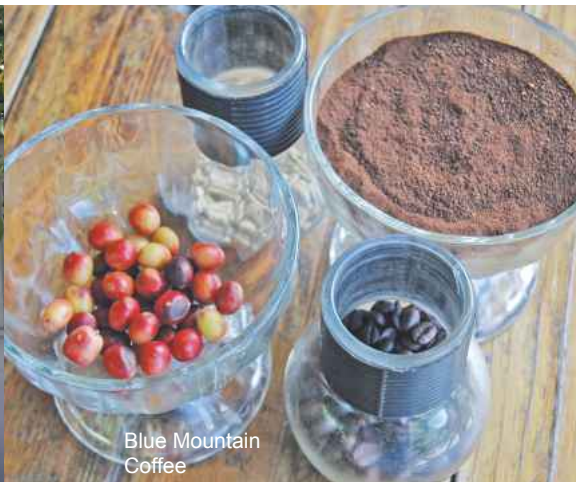
The cruise business remains at the heart of the island's tourism industry, with around 600 ship calls a year. During 2018, a total of 1,843,949 persons disembarked in Jamaica's cruise terminals, of which Falmouth in Trelawny received the largest number with 744,671 passengers, followed by Ocho Rios with 586,715, and Montego Bay with 512,563.

Kingston has traditionally not been a great draw for cruise guests because it has been seen as more of a business destination, but this is set to change with the opening in early 2020 of a new cruise terminal at Port Royal, just a few kilometres from the capital, as part of the renovation and re-opening up of this so-called 'sunken pirate city'.

# What makes the country different?



Bob Marley museum



Blue Mountain Coffee



Rum cake (above) is available in trendy deli stores in Europe, Central and Latin America, as well as stores all across Jamaica.

**T**here are so many characteristics, cultural attractions and personalities that make Jamaica stand out and difficult to forget that some might consider any professional involvement there a case of doing 'business in Paradise.'

From privateer-turned-politician Capt. Henry Morgan to reggae musician Bob Marley or sprinter Usain Bolt, from Blue Mountain coffee to the "Cool Runnings" of the national bobsleigh team, who doesn't feel they already know the Caribbean's main English-speaking island even if they have never set foot there?

Increasing numbers of tourists are now flocking to the tiny island, which measures just 230km long by some 50km wide, thanks largely to the burgeoning number of cruiseships calling at Montego Bay, Ocho Rios and the recently restored 'sunken pirate city' of Port Royal just outside capital Kingston.

All visitors are assured a warm welcome by an island that wears its heart on its sleeve. 'It doesn't matter what walk of life you are from, everybody treats everybody the same

when you are in Jamaica,' as one leading businessman on the island has put it.

Besides its people, some Jamaican products have made the island famous around the world.

While Barbados is considered to be rum's historical birthplace, the high quality of the spirit produced in Jamaica has made the drink synonymous with the island. Today, four rum distilleries operate on the island – Hampden Estate, Appleton Estate, Worthy Park Estate, and National Rums of Jamaica – and sell their output in over 70 countries worldwide.

Jamaican rum has a distinct flavour, with more body and rich spicy tones, and the chance of a tasting tour of one of the island's distilleries is not to be passed up lightly.

Likewise, Jamaican rum cake – also known as Jamaican black cake – is the island's famous variant of a traditional recipe popular across the Caribbean. The gift of a cake implies a deep friendship with the recipient, since the cake's ingredients can be costly and its preparation an intense labour of love, making it a truly valued token of esteem. Thanks to the JP Group, Tortuga

'Jerk' is a style of cooking native to Jamaica in which meats are rubbed or marinated with a hot spicy and smoky mixture called Jamaican jerk spice. The tradition dates back to Colonial times and today nearly all restaurants pride themselves on having 'their own' jerk dishes ranging from light spicy to very hot, mostly meat but sometimes vegetarian. Jerk sauces and seasoning mixes are widely available and are another 'must' present to bring back from the island.

Blue Mountain Coffee, grown on Jamaica's inland hills of the same name that are regularly shrouded in mist, is well known to connoisseurs of the drink and regularly tops lists of the world's best coffees. Over the last 25 years its reputation for quality has grown steadily and today it commands very high prices, meaning most is exported to countries like Japan, the US or Europe. Jamaica is very keen to retain the product's reputation and requires registration of Blue Mountain coffee producers, many of whom offer tours of their plantations.

Finally, Bob Marley and fellow members of his early band The Wailers – such as Peter Tosh and Bunny Wailer himself – are the very epitome of reggae, having helped develop the musical form from other Jamaican popular styles such as ska and rocksteady. Marley was born in the small rural village of Nine Mile, also his final resting place, where the cottage he grew up in is now a museum in his honour and where an obliging Rastafarian guide offers customised tours that inevitably include a rendition of one of the great man's songs.





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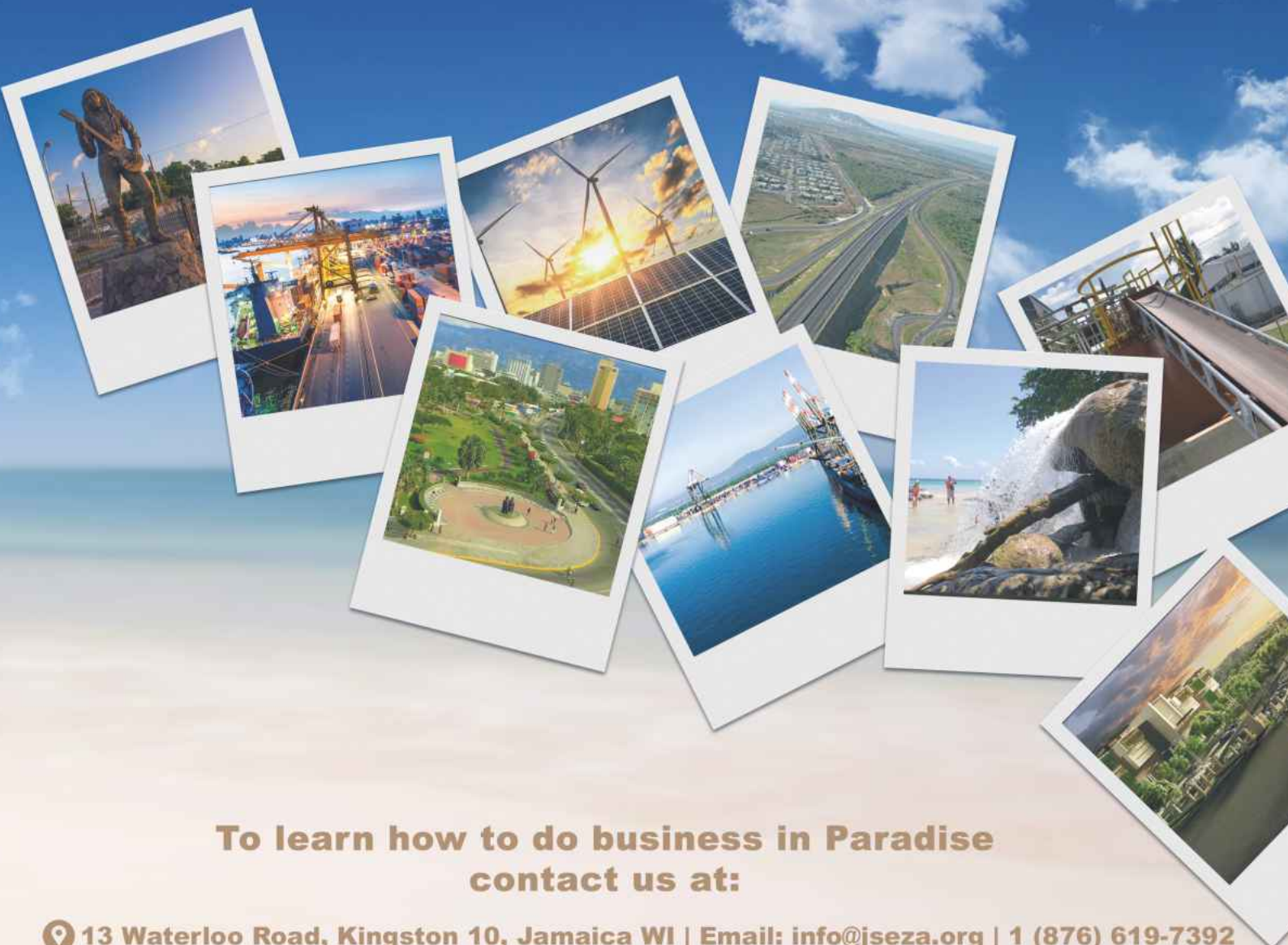




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