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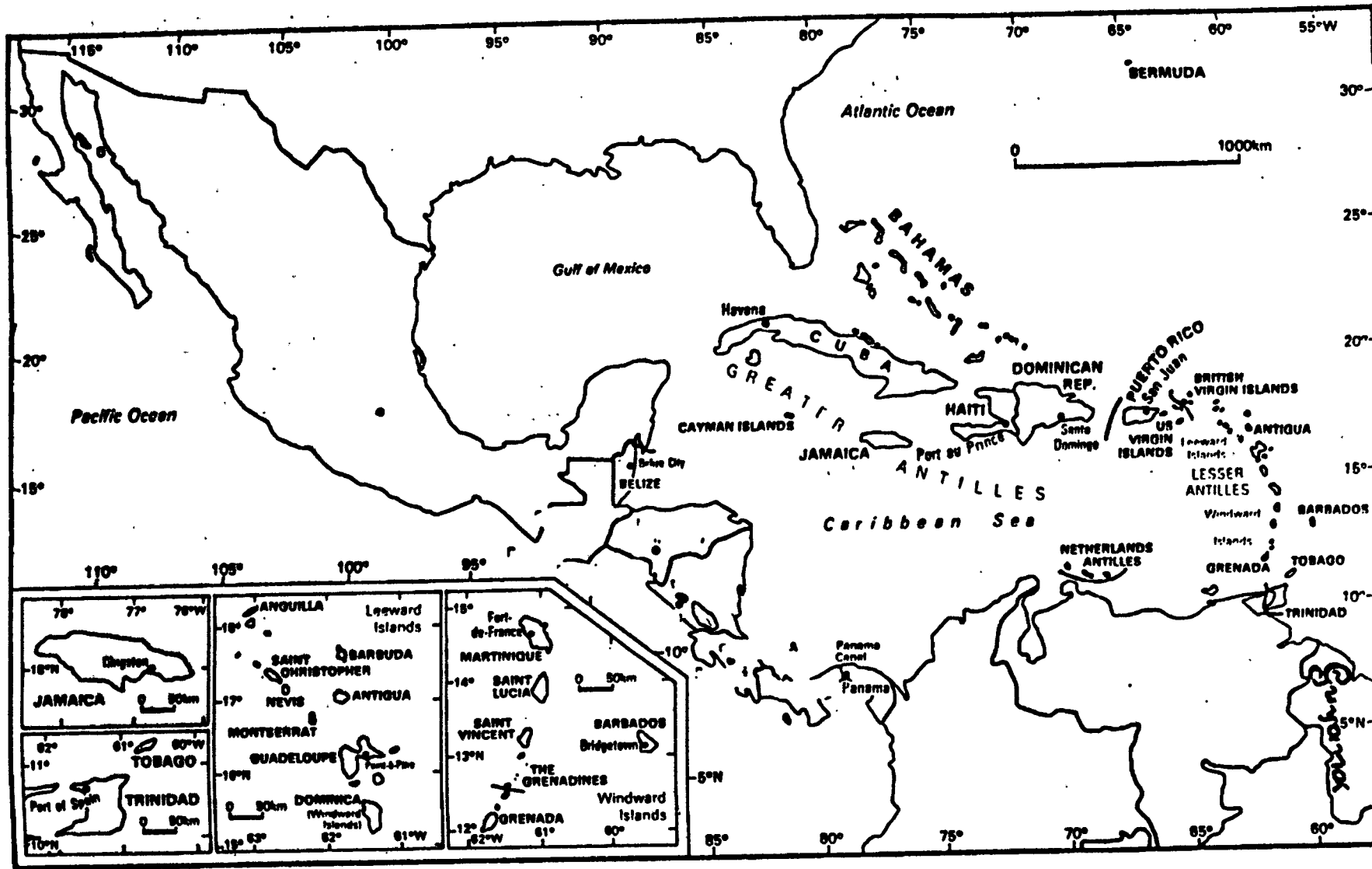
TOWARDS THE ESTABLISHMENT
OF
A MARINE INSURANCE INDUSTRY
IN
THE CARIBBEAN REGION

by

CARROL J PICKERSGILL
GMA₁ / 87

WORLD MARITIME UNIVERSITY

The Caribbean



The Caribbean

WORLD MARITIME UNIVERSITY
MALMO, SWEDEN

TOWARDS THE ESTABLISHMENT OF A
MARINE INSURANCE INDUSTRY
IN THE CARIBBEAN REGION

by

CARROL J. PICKERSGILL
JAMAICA

A paper submitted to the Faculty of the World Maritime
University in partial satisfaction for the award of a
MASTER OF SCIENCE DEGREE
in
GENERAL MARITIME ADMINISTRATION

The contents of this paper reflect my own personal views
and are not necessarily endorsed by the University.

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ABSTRACT

This study examines existing marine insurance markets or facilities and laws in the Caribbean and which are largely provided, since the colonial days by the traditional maritime nations and especially England, in the light of recent maritime developments in the region.

To this end the study shall look at the marine insurance industries of established maritime nations in general and their relationship with the developing countries to which the Caribbean belongs.

The London and Norwegian industries have however been singled out for special consideration. The London Market has been selected because it stands as the oldest marine insurance market and one on which many Caribbean countries continue to place their risks.

The Norwegian Market has been chosen, not only because of the wealth of assistance Norwegian governments and private enterprise has given to maritime development in the Caribbean but also because it is somewhat different to the London Market and stands as a viable alternative, although neither can be seen as a substitute to the development of the local sector.

It is considered that the greatest disadvantage of same is the vacuum created in place of the development of local expertise and consequent underdevelopment of the local market and a guaranteed dependence on overseas placement which is inimical to present economic realities.

It is therefore proposed to consider the development of such local expertise with a long term aim towards establishment of an indigenous and recognisable marine insurance industry geared to suit the needs and aspirations of the Caribbean Community.

An analysis has been attempted of the Caribbean experience by way of a small survey conducted amongst major ship owners and cargo traders within the region. The survey is by no means exhaustive neither are the returned responses considered complete. However, the survey does indicate the size of the market, the placement areas as well as the estimated premium expenditure of the Caribbean.

The case of The Port Authority of Jamaica has been illustrated in this study because it is considered as a fitting means of highlighting some of the problems attendant upon the placement of marine insurance overseas, given existing local conditions, regulations and certain fiscal policies necessary to the development of the countries as a whole.

Some suggestions and recommendations towards the establishment of a marine insurance industry in the Caribbean region have been incorporated in the study and are further summarised in the Conclusion.

INTRODUCTION

WHY A MARINE INSURANCE INDUSTRY?

Marine Insurance like other forms of insurance is a risk transfer mechanism. It is intimately connected with foreign trade and in fact may be seen as the "backbone of shipping" which necessarily facilitates such trade. Developing countries, by their nature are usually forced into risky exposures. In a highly capital intensive world they have very little capital at their disposal. They are often producers of single commodities and so depend greatly on foreign trade. .

Caribbean islands are classed amongst the countries of the developing world. Like most developing countries the islands therefore have to rely on an efficient transport system to facilitate their access to foreign markets. Many developing countries are now shifting from former dependence on developed countries for transporting such trade. They are consequently moving towards the establishment of their own merchant fleet, not only as a means of improving their balance of payment situation but also with a view to promoting their foreign trade. .

This study is therefore concerned with the importance of developing a marine insurance market in the Caribbean region, given the move by some of these islands towards development of merchant fleets as well as investments in modern and sophisticated ports and facilities.

In addition to merchant fleets mentioned above, many developing countries through their Ports and Ports Authorities now own and operate not only harbour crafts,

such as is used by harbour police and fire departments, but also larger rescue boats, tugs, work launches, ferry boats and or barges.

Further, for Caribbean islands, as is the case with most island states, the sea is a prime source of internal economic sustenance. Fishery and Tourism are usually at the base of the economic structure of almost all of these islands. Literally hundreds of fishermen not only in small canoes but also in larger and more sophisticated vessels used for deep sea fishing, earn their livelihood as well as food for the nation, from the seas of these islands.

These fishermen are often left on their own to contend with the perils of the sea and the vagaries of nature. Therefore, they often have neither the force of law nor the incentive of future reward to impel them towards the practice of good seamanship or maritime safety for themselves or for other users of the sea.

In one case reported to the Marine Board of Jamaica for example, a Jamaican fisherman had his vessel which he alleged had broken down in the middle of the channel smashed and sunken, and himself and members of his crew narrowly escaping death, by a large breakbulk vessel which had been entering the channel.

The breakbulk vessel which was owned by and registered in a foreign country was at first arrested by the Marine Board. However her almost immediate release was secured by attorneys in Jamaica acting on behalf of her P. & I Club, who contended that the Board had no power, under the circumstance to detain the vessel. The fisherman who

had no insurance was consequently left without his only means of livelihood and without any legal remedies.

Within the Tourist industries of many of these islands, watersports activities not only serve as a means of entertainment to tourists but also as a means of livelihood to the many nationals who operate them.

These sporting activities often involve the use of small crafts used for example, to pull water skiers or jet skiers. The use of larger vessels is sometimes utilised. Formerly these vessels were under no regulations. Recently however the Jamaica Government enacted legislation making it compulsory for all persons operating in the tourist industry to be properly licenced and for their vessels to be licenced by the Marine Board. There is however no requirement for such vessels to carry insurance coverage.

Cruises have always been one of the hallmarks of Caribbean tourism. This may be in the form of cruises within the individual islands or cruises around the various islands. These vessels are usually large passenger vessels and are almost always registered with foreign registries. They normally carry full marine insurance coverage, particularly the ones engaged in inter island cruises.

Hand in hand with the tourist trade as well as with certain middle-class ethics enhanced by the proximity of the sea in the islands, yachting has become one of the pleasures to be enjoyed on these islands.

Some of the more prudent yachtsmen, whilst not being particular about the practice of good seamanship and proper

certification, are often careful to insure their vessels and especially where there exists local insurers willing to take the risk.(1)

As tourism and yachting flourish in the Caribbean, so has the business of marina operations. However whilst yachts and other crafts, including large vessels, left in the care of these Marinas, may be insured by their owners, many marina operators fail or neglect to insure against legal liability for loss or damage to or by crafts left in their care and custody.

In light of the foregoing it is to be perceived that there is a potentially large market for marine insurance in the Caribbean. However, and although the Caribbean is said to be poised for development as an autonomous maritime region, marine insurance does not seem to play any major role in this development. This is in spite of the fact that such insurance is one of the most important mechanism for protecting against certain risks inherent in any such development as well as being complementary to the setting up of a shipping register for which plans are being made. (2)

(1) See case involving overturning of "The Seaquel" and consequent drowning of 3 persons, June 1982 - Marine Board Report Jamaica, 1986

(2) See for example: Working Paper, Maritime Task Force of Jamaica d/d 10.5.83 titled: "DEVELOPMENT OF JAMAICA AS AN INTERNATIONAL MARITIME CENTRE-MACHINERY FOR THE REGISTRATION OF SHIP. See also Fourth Report of The Law Commission on Marine Insurance (Trinidad & Tobago) op.cit.

Also noteworthy is the reported intention of the Caribbean Economic Community (CARICOM) to embark on the promotion of intra regional trade. Such a move would no doubt necessitate increased insurance activities within the region.(3)

The reasons for this lack of marine insurance participation could be due to the lack of local expertise, or to the ignorance on the part of developers, or to the non-existence or partial non existence of viable local marine insurance concerns or to the opined prohibitive cost of obtaining existing marine insurance coverage.

Nonetheless, and whatever the real reasons are, the fact of what is perceived as an over dependence on the markets of the traditional maritime countries has become of sufficient concern to warrant examination.

(3) See Seatrade: North American Yearbook 1985 p. 31

CHAPTER 1

SOME DEFINITIONS & DELIMITATIONS

The definitions herein will relate principally to those contained in and applied by existing Caribbean laws. However, given the dominance of the British market, such definitions may be mere re-enactments of British statutes. References to British statutes, particularly the principal enactment, The United Kingdom Marine Insurance Act 1906 (hereinafter referred to as "the 1906 Act") are to be taken as being applicable to Caribbean laws.

1.1 Marine Insurance

The Marine Insurance contract has been defined by the United Kingdom Marine Insurance Act 1906 (hereinafter referred to as the 1906 Act) as :

"...a contract whereby the insurer undertakes to indemnify the assured, in the manner and to the extent hereby agreed, against any losses that is to say, the losses incident to marine adventure."

In essence the assured, by the payment of a premium, transfers his risk to the insurer who, on the occurrence of stated losses pays for such losses "to the extent.. agreed". Such losses must have been occasioned consequent on a "marine adventure".

Marine adventure is itself defined as occurring where:

- (a) any ship, goods or other moveables ... are exposed
- (b) the earnings or acquisition of any freight, passage money, commission, profit or other pecuniary benefit or the security for any advances, loan or disbursements are endangered by exposure to...
- (c) any liability to a third party incurred by the

owner of or other person interested or responsible for insurable property by reason of Maritime Perils". (1)

Maritime Perils is defined by the 1906 Act to mean:

"The perils consequent on or incidental to the navigation of the sea, that is to say, fire, war perils, pirates, rovers, thieves, captures...and other perils of the like kind or which may be designated by the policy."

The perils provided for by the Act may be extended by the inclusion of additional perils under the Institute Clauses. Not all the perils so added are of a marine character. This is particularly true in the cases covered by the Inchmaree Clause and Liner (Negligence) Clauses which extend to cover certain machinery damage involving latent defect, malicious acts, negligence, error of judgement and or incompetence of the crew.(2)

It is noteworthy that the Insurance Act (General)1973 of Jamaica further defines maritime perils to include:

(1) See Section 3 of the 1906 Act. Also sections: 5&7 of the Marine Insurance Act (1973) Jamaica; Act 1978 of Trinidad and Tobago; Act (1979) Barbados for similar definitions.

(2) Clauses framed and sanctioned by the Technical and Clauses Committee of London Underwriters for attachment to the Standard form of Policy.

"...risks incidental to the construction ,repair or docking of vessels including third party risks..."

The Lloyd's SG policy form also cause maritime perils to include "... charges to sue,labour and travel for or in and about the defence,safeguard, recovery of goods merchandise and ship..."

Subject Matter:

Ships and goods have always and universally been regarded as the proper and main subjects of marine insurance.

Insurance on ships is usually taken to include the hull and machinery. However, Schedule 1 Rule 15 of the Rules of Construction to the 1906 Act provides that the term ship includes the "...hull, materials and outfit, stores and provisions for the officers and crew and in case of vessels engaged in a special trade, the ordinary fittings requisite for the trade, and also, in the case of a steamship , the machinery, boilers and coals and engine stores,if owned by the assured."

SHIP:

It is worthy of note that the term "ship" though denoted as inclusive of certain items, is not of itself defined.- However this term has been defined in the various Merchant Shipping Acts. The British Merchant Shipping Act (1894- repealed) first defined ship, as "a ship registered in the (UK) not including a fishing vessel."Later Acts have defined ship to mean: "...any description of vessels", "any vessel used in navigation not propelled by oars (and inclusive of fishing vessels).

It is also noteworthy that in dealing with the licencing and registration of vessels, certain Acts exempt vessels

below a certain size, fishing vessels pleasure crafts and government owned vessels from such requirement.(3) In recent times there has however been a move away from such exemption of these vessels. (4)This means that all crafts are now being required to be properly licenced and registered in the interest of maritime safety and of cleaner seas.

CARGO/GOODS

According to rule 17 in schedule 1 to the 1906 Act, the term "goods" means goods in the nature of merchandise and does not include personal effects of provisions and stores for use on board." Therefore clothes and other personal effects would not be covered on a goods (cargo) policy, unless shipped as such and although the ship only carries passengers. The materials in which goods are packed may be considered as part of the cargo .

However in the case of containers and similar articles of transport which have a commercial value of their own, it is believed that it is not the practice to treat them as being covered by a blanket policy on cargo They therefore have to be covered by a separate policy . However where they are owned or hired by the owner of the carrying vessel they are usually covered by specific wording on the hull policy as part of the ship. (5)

(3) See Marine Board Act(1958) Jamaica

(4) See Act Amending The Tourist Board Act (1986) Jamaica

(5) See Arnould -Law of Marine Insurance and Average (1981)Sixteenth Edition Volume 2. p. 310

FREIGHT

Rule 16 Schedule 1 to the 1906 Act provides that in the ordinary policy, the term "freight" includes the profit derivable by a shipowner from employment of his ship to carry his own goods or moveables as well as freight payable by a third party but does not include passage money.

It is the writer's opinion that the other subjects of marine insurance as provided for by the Acts and denoted herein are self-explanatory and therefore no further explanation will be entered into.

Delimitation

Whilst this study will deal with Marine Insurance as a composite subject, emphasis will be placed on hull and machinery (ship's) insurance. This is due mainly to the writers previous dealings with this type of insurance and the availability to her of information on same.

1.2 THE CARIBBEAN

Defined

The Caribbean may be described as an island grouping surrounded by the Caribbean Sea. Frequently this grouping is held to include not only the islands but also mainland territories such as French Guiana, Guyana, and Surinam which are geographically part of South America. Bermuda which is geographically part of North America is also included.

The political statuses of the Caribbean territories range from fully independent countries such as Cuba, the Dominican Republic and Haiti through to independent members of the Commonwealth such as Jamaica and Trinidad and

Tobago to dependencies of: France such as French Guiana, Guadelope and Martinique; Netherlands such as The Netherland Antilles; The U.K such as the Cayman Islands, Montserrat, Turks and Caicos Islands; The U.S. such as The U.S. Virgin Islands and Puerto Rico with its commonwealth association to the U.S.

The shipping interest of the Caribbean is served by two regional bodies, The Caribbean Shipping Association and the West Indies Shipping Association (WISCO) which is a multinational shipping company owned by the Caribbean Community (CARICOM). There is also the Naviera Multinacional del Caribe which is another multinational shipping line owned jointly by Caribbean member states and some Latin American countries.

It should be noted that the West Indies is also used to denote Caribbean states, especially those of the non-Latin Caribbean.

Delimitation

For practical purposes the study will be confined to the English-Speaking Caribbean countries. Of these emphasis will be placed on the islands of Jamaica, Barbados and Trinidad and Tobago. This is due mainly to the fact that these are the larger islands and with the exception of the Bahama Islands, Bermuda and The Cayman Islands which operate open registries, are the most important ship owning islands.

Market/Industry:

The term "marine insurance market" has been defined to refer to a loose description of a place where marine insurance is conducted or to a group of insurers offering

a particular type of insurance. Alternatively the term industry is used to collectively refer to the grouping of both insurers and assureds for the purpose of conducting marine insurance business. A Caribbean marine insurance industry is therefore being used to denote such a group of insurers within the Caribbean who are willing to offer marine insurance to ship owners/operators and cargo traders within the region.

CHAPTER 11

THE LAW RELATING TO MARINE INSURANCE

In this Chapter, which cannot be divorced from Chapter One, a discourse on laws and principles considered to be fundamental to the business of marine insurance as well as a brief examination of certain related if not wholly applicable international Conventions will be attempted. Towards the end of the Chapter an attempt will be made to encapsule relevant Caribbean legislations, these, to a large extent, are either verbatim incorporation or are mere re-enactments of British laws, particularly, the 1906 Act.

2.1 Some Basic Principles

Insurable Interest:

One of the fundamental concepts of insurance is that one cannot insure against loss of or damage to property unless the proposed assured has some sort of interest in the property. Such "insurable interest" is found to exist wherever the assured stands to benefit from the safety of the property insured or be prejudiced by its loss or damage.

In a marine insurance contract and different to any other contract of insurance this interest need not be present at the time the contract is effected but it must be present at the time of the loss.(1)

(1) See Sections 5 & 6 of the 1906 Act

Indemnity.

It has been said that:" In theory the purpose of any form of insurance is to replace that which has been lost. It is not intended that the assured should make a profit from his loss but that he should merely be in no worse position than he was before the loss occurred." The principle of indemnity is therefore central to the definition of marine insurance.(2)

Total & Constructive Loss, Average & Contribution:
It is of note and often of some concern to assureds that such indemnity, subject as they are to "agreed extent", sometimes does not fully compensate for what has been lost. This may be so for example where as under English policy conditions, the extent agreed usually includes general average contributions and sue and labour charges as well as the usual policy deductibles.

In the case of a total loss of the subject matter, the insurer is liable for the full measure of indemnity which may be fixed by the policy. Also where there has been particular average loss that is, partial loss caused by a peril insured against, or where there has been general average loss, that is, a loss caused by or directly consequential on "any extraordinary sacrifice or expenditure, voluntarily and reasonably made or incurred in time of peril for the purpose of preserving the property imperilled in the common adventure" (3) such as in jettison or voluntary stranding to avoid shipwreck, the full measure of indemnity less policy deductibles may apply.

(2) See Arnould, Law of marine Insurance Vol. One (opcit)

(3) See Section 66 of the 1906 Act.

However in the case of general average contributions for which the assured may be liable or for example, for salvage charges, both of which may be in addition to particular average loss suffered by the assured, the assured may be treated as being technically underinsured where his expected indemnity in this case exceeds the agreed value. As provided, for example, by Section 73 of the 1906 Act: "... the indemnity payable by the insurer must be reduced in proportion... a deduction from the contributory value, and for which the insurer is liable, ..must be deducted from the insured value in order to ascertain what the insurer is liable to contribute."

A constructive total loss may be treated in the same manner as a partial loss or the assured may serve notice of abandonment on insurers thereby entitling them upon acceptance of same, to exercise subrogation rights, that is, to take over the interest of the assured, as well as in this case, all proprietary rights incidental thereto.

Agreed Value:

In a Marine Insurance Contract a value can be agreed between insurer and assured and which value will be conclusive of the actual insurable value of the insured property, except in the case where there has been a constructive total loss or partial loss as has been explained above.

Uberrimae Fidei & Disclosure:

A Contract of Insurance is deemed to have been effected in good faith, in the absence of which the policy can be avoided. In the case of Marine Insurance an underwriter may have never seen a ship but acts on the word of the assured as to its existence, value, destination, and such

descriptions will be considered by potential insurers in deciding whether or not to accept the risk and at which premium rate. The disclosures and representations made by the assured concerning the risk must therefore be accurate. (4)

In the event of non disclosure or misrepresentation of a material fact by the assured the insurer may treat the contract as being void ab initio, that is as if it had never been entered into. Where a misrepresentation was innocently made there may be a return of premium.

The Policy

A contract of Marine Insurance must be embodied in a marine policy (in accordance with The Act) for it to be admissible in evidence although reference may be made to the slip or covering note in attesting to the conclusion of such a contract. (5)

These principles are merely some of the concepts underlying the basis of the marine insurance contract. Each country may have different legislation governing such contracts. Although the exact content of such legislation varies from country to country, broadly speaking, it can be said that such legislations often, though not universally, contain these principles as well as aspects of the contractual relationship governing such subjects as double insurance, warranties, assignment of the policy, the voyage and the premium.

(4) See Section 17 of the 1906 Act.

(5) See Section 22 of the 1906 Act.

2.2 International Legal Regimes and Conventions:

The term Legal Regimes is being adopted here and has been used to refer collectively to all rules and procedures that affect the contractual relationship of the marine insurer and the assured.(6) It thus includes the policy conditions and legislative provisions as well as supplementary influences such as judicial decisions and market practices.

Marine Insurance functions in a very international context. However there are no uniform policy conditions. Instead there are varied policy forms produced by numerous national markets. (7) The most widely known and used of these forms is the LLOYD'S SG Form on which the British Marine Insurance Policy is based and which has remained remained virtually unchanged since its formulation in the eighteenth century. (8)

This form became so widespread as to make it virtually de facto international insurance conditions. It has been asserted that some two thirds of the major maritime countries of the world and three quarters of

(6) Report of UNCTAD Secretariat on Legal and Documentary Aspects of the Marine Insurance Contract (1982)TD/B/C/ISL/Rev1 at pp 11

(7) opcit

(8) The form was recently revised and a new form the MAR approved for usage.(1982 Cargo Clauses; 1983 Hull and Institute Time Clauses).

the developing countries use this form either solely or as an alternative to or in conjunction with local policies. (9)

The historical economic predominance of the British Market in terms of insurance placement on both a direct and re-insurance basis, particularly from developing countries has been cited as one of the reasons why British conditions continue to be so widely used despite the absence of any obligation to use them. The level of expertise and established precedent is another of the reasons advanced. It has also been asserted that insurance policies written subject to British conditions will be considered easier to re-insure or co-insure and will be more readily accepted by foreign assureds. (10)

With respect to legislation, numerous countries rely on the Marine Insurance Act, 1906 (UK) as the basic legislative regulation of the Marine Insurance contract. This reliance is occasionally formalised in some countries by incorporating the British Act into legislation either verbatim or in similar form. In other cases it is less formalised in that it may result from the practice of the local judiciary to refer to British law, as in the case of the U.S. or from contractual stipulation in the marine insurance policy. (11)

(9) UNCTAD Report (1982) opcit.

(10) UNCTAD Report (opcit.) at p 12

(11) UNCTAD Report (opcit) at p. 13

It is worthy of note that developing countries are not alone in the practise of referring to British law but that many developed countries and some socialist countries also refer to British Law. Hence the existence of local Marine Insurance legislation, does not preclude a reference to British law even if limited to a particular type of marine insurance, such as cargo exports. (12)

It is also noteworthy that even where national legislation exists there is still a tendency to leave a fair amount of discretion to the parties as to the exact terms and conditions which will govern their insurance relationship. In these places legislative provisions frequently tend to be optional so that they can be altered by contract. (13)

In some countries therefore, the legislative provisions applicable to Marine Insurance are completely overridden by uniform contractual rules agreed upon by the private industry within the country. (14)

(12) Case of Scandinavian countries.

(13) UNCTAD Report (1982) opcit at p:13

(14) Case of the Norwegian Marine Insurance Industry.

International Conventions:

Despite the international characteristics of Marine Insurance there exists no International Convention applicable to it.(15) However there are certain Conventions which may be seen as relevant to marine insurance. Such Conventions relate to insurances in the event of oil pollution damage by ships.

Whereas one of the functions of Marine Insurance and especially that section dealt with by The Protection and Indemnity Clubs, is to insure against legal liability of shipowners to third parties, such liability relate primarily to physical damage or loss and not so much to material damage as may be occasioned in the case of oil pollution.(16)

It has indeed been unfortunate that the necessity for the international response to such liability was only heeded after accidents occurred which resulted in disastrous consequences on the marine environment as well as on the coastlines of certain states.(17) The Conventions now in force and which provide some form of insurance in the case of oil pollution include:

(15) UNCTAD Report opcit at pp 4

(16) But see Pollution Hazard Clause in Institute Time Clauses.

(17) See reports of accidents involving The M/v "Torrey Canyon (1967) and The M/V "Amoco Cadiz"(1978) causing pollution damage of millions of dollars.

1. The International Convention on Civil Liability for Oil Pollution Damage (Civil Liability Convention) and Protocols of 1976 & 1984:

This deals with pollution damage arising from the escape or discharge of oil from laden tankers. In becoming a party to this Convention a state has the right to demand that all tankers, wherever registered, entering its ports, must be insured against the limit of their liability under the Convention. Tanker owners of member states must therefore be insured. Further the offended state has the right of direct action against the insurer, in the event that the ship owner does not ensure the payment of a claim for compensation.

2. The International Convention for the Establishment of an International Fund for Oil Pollution Damage (Fund Convention (1971) provides additional cover to that provided under the Liability Convention to indemnify the ship owner for part of the increased burden placed on him under The Liability Convention. (18)

VOLUNTARY COMPENSATION SCHEMES

The Tanker Owners Voluntary Agreement concerning liability for oil pollution (TOVALOP) and the Contract Regarding an Interim Supplement to Tanker Liability for Oil Pollution (CRISTAL) are International Agreements by entities in the nature of Mutual Association oil

(18) See also York-Antwerp Rules (1974)- uniform international system of rules concerning average adjusting; Hague Rules on Carrier's Liability (1924) & Hague Visby Rules (1968); Convention on Liability of Shipowners (1957) & 1976.

of companies and Tanker Owners who have joined together for the purpose of indemnifying national governments for expenses incurred in the clean up of oil spills.

It is of note that without these measures and assistance from the international community and if individual tanker owners and oil companies were to otherwise individually approach their insurers, problems concerning the capacity of the world's insurance markets to underwrite unlimited liabilities may have arisen.

2.3 CARIBBEAN NATIONAL LAWS:

There is no uniform legislation within the Caribbean region. However a general perusal of the laws of the various island states tend to show that legislation on marine insurance usually exist in the form of a specific enactment which is sometimes supplemented by enactments on general insurance laws. Some examples of such enactments are: The Jamaica Marine Insurance Act (1973) and The Jamaica Insurance Act and regulations (1973); The Barbados Insurance Act (1979) and Exempt Insurance Act (1983); The Trinidad and Tobago Marine Insurance Act (1978 and The Stamp Duty Act; Marine Insurance Acts of The Cayman Islands read with the Merchant Shipping Act 1894 to 1919 of the UK and The Marine Insurance Act of The Bahamas (1965) and Act 39 of 1908.

Many of the Acts are also incorporations of the 1906 Act, either verbatim or in similar form. In fact many of these laws are re-enactments of The Federal Act which was in force in all the islands before the dissolution of the Federation of the West Indies in 1962 and which law closely followed or incorporated The 1906 Act. Before the enactment of the Federal Law, the law of Marine Insurance

was to be found in The Law Merchant and the Common Law of England which were received in the then colonies as the islands had been.

Section 4 of The Jamaica Marine Insurance Act (1973) for example still provides that " The rules of the Common Law including The Law Merchant , save in so far as they are inconsistent with the express provisions of this Act, shall apply to Contracts of Marine Insurance." Section 3 of the Act further provides that "This Act shall not apply to contracts made before the commencement of this Act or to marine insurance undertaken by the government other than insurance that extends beyond the limits of the island."

The Lloyd's SG form, as is the case with the other islands, forms part of the schedule to the Act. Section 27 of the Act further provides that contracts of marine insurance must be embodied in a policy in accordance with the Act. However and pursuant to Section 4 the revised Lloyd's Form of 1983 (MAR Form) of policy would be applicable.

The Caribbean Laws are therefore, in keeping with precedents set by developed countries as well as developing countries in their heavy reliance on British Laws. The reason for such reliance and the general feeling of the Caribbean may be expressed in the words of the Trinidadian Law Commission dealing with The Amendment and Re-enactment of the Law relating to Marine Insurance:

" The law as embodied in the UK Act represents the experience of a leading Maritime Nation, extending over nearly three centuries. It has stood the test of time, and

it has been adopted in many Commonwealth Countries. It can well be said to have assumed the status of a law of nations.As the law of Marine Insurance is international in character, both convenience and expedience require that our law should, as far as possible, be in conformity with a model that is accepted in Common Law countries and that hitherto has been applied locally. Moreover, there is an appreciable body of case law that interprets and elucidates the UK Act and its analogues that would be of assistance to our Courts in applying (our) Act. Many Marine Insurance policies are insured and reinsured in England and are governed by English Law. Uniformity of Law on policies will facilitate business and a form more worded in modern conceptions might involve misapprehensions." (19)

(19) Opcit-reported in Special Supplement to The Trinidad and Tobago Gazette Vol. 17 No. 187 20.6.78
But see UNCTAD Report (opcit) at pp 5 which states...The tendency for Marine Insurers to avoid formal litigation to settle disputes results in acute absence of legal decisions.

CHAPTER III

THE STRUCTURE OF THE INTERNATIONAL MARINE INSURANCE MARKET

London has been universally recognised as the principal international centre for marine insurance despite the establishment of markets in developing countries and the tendency towards expansion of insurance markets of the developed economies which were previously satisfied to confine their operations to domestic business. A review of the structure of the London market is therefore to be considered as a fair representation of the international market structure.

3.1 The Lloyd's Market

The Lloyd's Market has often been described as the only true market place in the insurance industry. " It is not a single insurance company. It is in fact a market place to which brokers bring risks and underwriters openly compete with each other to insure against these risks". (1)

Though regarded as the oldest and largest market place in the world Lloyd's has no branches in The UK or overseas. The sole place of business is the underwriting room at Lloyds in the city of London. This "market place" is however not open for business from the general public, instead all transactions must be conducted by a Lloyd's broker. Such brokers are approved by the ruling body, the

(1) The Professional Mariner -Vol Three No1 Aug. 1985,10

General Council or The Committee of Lloyd's after strictest examination of their financial position, and who may then be allowed the name of "Lloyd's Broker".

Though joined together for the purpose of writing insurance the Association at Lloyd's in fact comprises of individual insurers, numbering some 14,000, each with unlimited personal liability for the risks they underwrite. These individual underwriters are grouped into some 300 syndicates. The affairs of each syndicate are managed by an underwriting agency which is responsible for appointing a specialist underwriter to accept risks on behalf of the other non-active syndicate members.(2)

In addition to brokers, there are agents approved by Lloyd's in practically every port throughout the world. They are not underwriting agents but are at the service of all underwriters, and not only of Lloyd's underwriters.

The Companies Market:

The Companies market comprises over 100 companies. They transact their business on a similar system to Lloyd's. The big difference is that the company underwriter is the salaried official of a limited company. Thus whereas the liability at Lloyd's is several and unlimited that of a company is limited to the capital of that company.(3)

(2) UNCTAD Report (1982) opcit

(3) Marine Underwriting CII Tuition Service (1981) at page 1/3

The Companies are represented by The Institute of London Underwriters (ILU). The Institute was created on much the same lines as Lloyds, ie: a number of underwriters exchanging views over coffee in one of London's 18th century Coffee houses.

The purposes of the Institute are the advancement of marine insurance and the protection of the interests of companies writing marine business through consultation and united action. The affairs of the Institute are managed by a Committee of 15, 3 of who retire annually and are eligible for re-election.

Although marine insurance is conducted on keenly competitive lines, tariffs are virtually non-existent. In normal conditions hull premiums are regulated according to shipowners' claims experience over a period of years and are influenced by various "Understandings of The Joint Hull Committee". The Understandings are mere codes of practice to be followed at the policy renewal with the insurer and broker being left free to negotiate the best initial terms possible.(4)

In all, there is said to be considerable co-operation between Lloyd's and the Companies and there are several joint committees such as The Joint Hull Committee, and The Joint Cargo Committee.

(4) ACII Tuition Service -opcit at pp 1/4

3.2 The Other Commercial Insurers:

Non Institute Companies:

The other commercial markets comprise those companies not yet acceptable to the Institute or of foreign companies who wish to participate in the London Market offerings through foreign branch offices. These markets deal primarily with portfolios other than those consisting of large fleets and vessels not immediately concerned with the carriage of cargo such as trawlers, fishing vessels, yachts, hovercrafts and other such specialist vessels.

Captive Insurance Companies:

A captive insurance company is a wholly owned subsidiary of a parent company formed for the purpose of carrying on the latter's insurance business, ie: the captive insures the risks of the parent company and re-insures the surplus amount of liability over and above its prescribed retention level. In order to obtain maximum benefit it is desirable to incorporate and manage it from somewhere where there is no local taxation, where premium and claims may be freely remittable and where legal, banking and accounting facilities are thought to be first class. One such place is Bermuda. The Bahama Islands, The Cayman Islands and Barbadoes are also being developed as suitable "grounds" for the operation of captive marine insurance companies.

3.3 Mutual Insurance Companies (P&I Clubs):

Section 85 of the 1906 Act provides that : "Where two or persons mutually agree to insure each other against marine losses, there is said to be mutual insurance". The Protection and Indemnity (P & I) Clubs embody this principle of mutuality.

The members of a P&I Club comprise the owners, charterers, managers and operators of ships who insure with it. Each Club is controlled by a board of directors who represent and are appointed by the members. The directors comprise a cross section of the members and reflect the differing flags, types of ship, trades and sizes of the Club's fleet. Cargo owners, due to their diverse interests have not yet been able to form themselves into mutual Protection and Indemnity Clubs.

Each Club has its own set of rules which are subject to the Memorandum and Articles of Association and contain the terms upon which the clubs conduct their business. These rules are constantly changing to meet the needs and requirements of members.

Originally the liabilities covered by the Clubs were limited to loss of life of crew and that part of the collision liability not covered by the commercial market ie: one fourth of the total claim by the other vessel and other third party liabilities. The clubs now also cover damage to fixed and floating objects as well as loss or damage to cargo, property, seamen's effects, injury and death of seamen and others plus many other liabilities which could result from the business of shipowning.

Members of the club contribute in respect of each policy year only towards the total amount required to meet claims and expenses in that year. They pay firstly a percentage of the estimated total cost as an "Advance Call". A "Supplementary Call" may be required to make good the Club's shortfall if any.

In order to minimise the exposure of members, there is a

Pooling Agreement between clubs whereby claims on one club presently in excess of US\$1.2 million are shared proportionately by members of all clubs. The liability of parties to contribute under the Pooling Agreement is unlimited save in respect of oil pollution risks. In addition the clubs collectively re-insure substantial parts of their liability for large claims in the commercial market under what is known as the Excess of Loss Re-insurance Contract.(5)

3.4 Mutual Associations:

Lloyd's Underwriters' Association: This body has no connection with The Committee of Lloyd's but is an Association of underwriting members meeting for consultation on matters of general insurance interests.

Brokers Association: Comprised of members duly qualified and registered to practise as brokers as is provided for by most national legislation. The activities include, the promotion of their views on proposed legislation governing insurance, harmonization of insurance practices and assisting with the training of new entrants to the broking profession.

The Salvage Association: The Association undertakes arrangements for salvage and also surveys of damaged property on behalf of underwriters and other interested parties. There are offices in some 29 ports of the world as worldwide correspondents who have close links with Lloyd's agents and others. Salvage vessels are not operated or owned by the Association but contracts for salvage are negotiated with owners and operators of such vessels.

(5) Marit. Pol. Mgmt.) 1985 Vol. 12 No. 1 pp 71-89

Association of Average Adjusters: Association of persons skilled in the computation of average claims. They are independent of both insured and assured and associate with the objective, among others, of promoting correct principles in the adjustment of averages and the uniformity of practice amongst average adjusters.

U.K. Society of Average Adjusters: Formed in 1981 between a number of adjusting firms who were not members of The Association of Average Adjusters.

3.5 The Caribbean Market:

As may well have been imagined the structure of the Caribbean Market is not different to the above outline. In fact as one Jamaican Superintendent of Insurance stated in his report : "Lloyd's of London is also a part of the Jamaican (Caribbean) insurance market".

It is worthy of note that in the Jamaican insurance market there exists a governmental body supervising the placements of insurance and especially with respect to statutory bodies and organizations. This body emanates from the Office of The Superintendent of Insurance. Similar offices exists in other Caribbean Territories.

This Office of The Superintendent of Insurance was established in Jamaica in 1972 pursuant to Section 3 of The (General) Insurance Act. The Office has responsibilities for the "regulation, supervision and control of the overall insurance industry". In this respect it plays a central role along with the Bank of Jamaica in the remittance of all funds applicable to the insurance industry.

This means that all premium remittances by individuals or

brokers on behalf of clients to overseas underwriters as well as reinsurance remittances and remittance for claims settlements from overseas underwriters fall within the purview and scrutiny of that office. Approvals for any foreign exchange payments must therefore be first submitted to and given by that office.

The Insurance Placement Committee acts in conjunction with the Office of the Superintendent. It was established to facilitate "orderly and objective arrangements for the marketing of the insurance portfolio of the public sector." By this arrangement all public sector and statutory bodies are required to place their insurance portfolio up for public tender. Local brokers are thereby invited to place tenders through the Placement Committee for these portfolios.

The Committee with the assistance of an overseas firm of Consulting Actuaries then make recommendation on awards to the Superintendent whose office has the responsibility to advise the various agencies of the broker selected to broke their insurance portfolio.

The process of tendering was advisedly introduced in the hope that the competition it would engender will serve to reduce premiums on the portfolios tendered. Prior to 1986 awards were made annually. Presently awards are made every three years.

As has therefore been noted, and with the exception of the centralised insurance office as notedly exists in Jamaica and no doubt in other Caribbean islands, the structure of the market is predominantly influenced by the British experience. However given the emergence of

independent states from former colonial territories as well as the growth of indigenous assureds and insurers in these emergent states, it is to be recognised that what was once a relatively simple international structure involving a few nationally oriented marine insurance markets in developed countries, now involves increasingly complex contractual relationships of assureds, insurers, co-insurers and re-insurers situated across numerous national and cultural boundaries.

It would therefore seem, that save from The International Regime as governed by International Convention as is being proposed by the Secretariat of the United Nations Conference on Trade and Development, a conflict in national interests and realities could result from such continued "crossing of boundaries".

An examination of an attempt to break out of the usual mould and to offer what may be perceived as an international package may be judged from the Comparison between The English and the Norwegian Marine Insurance Markets in the preceding Chapter Four.

CHAPTER IV

A COMPARISON: THE ENGLISH and NORWEGIAN MARKETS

4.1 Brief History & Development

The historical development of the English Marine Insurance Markets, epitomised as they are by The Lloyd's tradition, need no further introduction to this study. Suffice to say that the historical economic predominance of Britain in all spheres of life and moreso in shipping and which placed it at the forefront of the "discoveries of the New World", served to place it as the dominant international centre for marine insurance.

Like the English, Norwegians have also been held to be a seafaring people. Commercial shipping has been said to have been a major Norwegian industry for centuries. "Marine Insurance business has been transacted within Norway from the beginning of the 19th century. . . Before that and during Norway's period of union with Denmark, insurance was arranged through Copenhagen and the European Continent, Hamburg being particularly important.

During the Napoleonic wars communication with the Continent became very difficult. This stimulated the establishment of a number of insurance companies in Norway. The first companies concentrated on cargo insurance, while the concept of mutual hull insurance spread rapidly to the coastal towns. The two Norwegian Protection and Indemnity (P&I) Clubs were established around the turn of this century.

Since the second half of the last century a number of

insurance companies covering all classes of insurance were established in Norway.

Today the Norwegian Market does more than just serve the needs of the Norwegian fleet. It makes a significant contribution to the international market and is used by many non Norwegian shipowners." (1)

4.2 Structure:

The Norwegian Market is divided into 4 sectors:

1. The Company Market: This comprises a significant number of Norwegian Insurance Companies (mostly joint stock companies) which also carry out marine insurance business. These companies belong to the Central Union of Marine Underwriters (CEFØR) which act as a co-ordinating body and provides a number of services to its members. These companies have formed the Norwegian Hull Agreement and, associated with that, the Norwegian Hull Committee for the rating of domestic vessels. Its renewals are based on annual statistics over a five year period.

2. The Mutual Hull Clubs: These clubs, three all together, practise the concept of mutuality, as for example as is followed by P & I clubs. These clubs specialise in being "claims leaders" in the settlement of claims. All the mutual clubs belong to the Mutual Hull Clubs Committee (GSK). This committee along with the Central Union of Marine Underwriters co-operate with representatives of the Norwegian shipowners in producing clauses for the whole market as well as ratings and other matters of common interest.

(1) "The Norwegian Marine Insurance Industry, a leading alternative" Brochure by Norwegian Insurance Industry.

The companies and the Clubs may be seen as somewhat analogous to the British Companies Market. However the major differences, being the concept of the "claims leader" which is very unlike the "rate leader" in London and the fact of hull ratings being actually fixed by the committee in contrast to guidelines for the fixing of rates laid down by the London joint hull Committee, set them apart.

3. The P. & I. Clubs: The two (2) P.& I. clubs, Gard and Skuld, commenced operations about the beginning of the 20th century from the modest start of serving the needs of local shipowners but have now expanded to provide cover to vessels totalling in excess of 70 million gross tons or about 20% or one fifth of the world's tonnage. The clubs are members of the International Group of P.&I Clubs and hence provide cover on basically the same conditions as other clubs of the group save for certain exceptions which will be enumerated later.

4. The Scandinavian Market Agreement (Regional Co-operation): As Norwegian insurers became more involved in the international field, "it was natural to seek co-operation with the rest of Scandinavia (Sweden, Finland, Denmark)" This co-operation was organised through a market agreement (1st July 1983). Through the Scandinavian Market Agreement an independent and co-ordinated market has been established in the field of international hull insurance".

5. The Brokers and other The Support Services: Norwegian Brokers handle direct as well as following lines on most domestic fleets. Since the establishment of the Scandinavian Market Agreement, brokers have been

actively encouraged to secure international business. There are now some 10 broking firms dealing in international business, several of whom have established offices abroad especially in Singapore, Hong Kong and Houston in the USA. Average Adjuster, by virtue of the agreement as is contained in The Plan can act as "advisors, consultants and adjusters" as well as having the authority to take whatever measures they think reasonable" in dealing with a claim. Average adjusters are appointed by "the King" (government).

4.3 Laws & Conditions:

The Law: Despite the existence of a Maritime Code, General Insurance Act and Marine Insurance Act, the pertinent regulations relating to Marine Insurance in Norway, are comprehensively contained in the Marine Insurance Plan relating to Hull Insurance (1964) and The Plan relating to The Carriage of Goods by Sea (1967) and the Standard Conditions. The 1967 Plan, issued formerly by the Norwegian Classification Society, Det Norske Veritas, is said to represent the fulfilment of long negotiations between shipowners, insurers, shipyards and other parties in commerce and industry, forming the embodiment of their common interests.

As a background regime The Plan is designed to be both more complete and more specialised than the general legislation affecting marine insurance. Whilst it reproduces the more important of the mandatory provisions of Norwegian Law, it has its own rules in areas where there is freedom of contract. These are better adjusted to the special needs of marine insurance.

Whilst an in depth analysis of the two markets could

easily be the subject of a study in itself, the writer's main purpose here is to look at what are subjectively considered to be the most important differences and similarities or advantages and disadvantages of the two markets particularly in light of applicability to this study.

As is to be observed, the historical development and legal basis and in some respects, the structural base of the two markets appear to be different. The historical domination of world tonnage by the British fleet as well as the British colonial power in regulating trade in far away territories, most of which now comprise the developing countries, afforded Britain an international base in the development of its world markets and practices. At the same time however, the mentioned "power" of the British system served as a limiting influence on the international character of the market.

Hence although a certain amount of informal international consultation is said to take place between some markets, say during revision of the Institute Clauses, the overall content and form of the British legal regime remains for the most part "a national product geared to meet national needs and national laws". (2)

The development of the Norwegian market is itself based upon national needs and national laws or conditions and The Plan. Indeed the internationalization of the market may be seen as a direct response to national demands in this case, decreasing national demand caused by decreasing national tonnage, rather than any conscious attempt

(2) UNCTAD Report (opcit) p. 41

attempt at internationalization. However whilst the laws of demand and supply may taken to respond in the same manner nationally as well as internationally, the laws of a nation inherently reflect the values and customs of a people.

The concept of the Norwegian Claims Leader, for example, which has worked perfectly for many years to the benefit of the Norwegian insurer and assured may seem to the non Norwegian buyer to represent a conflict of interest with the assured on one side and the insurer cum adjuster and where necessary cum arbiter on the other side with no choice of an independent arbiter save perhaps an adjuster appointed by the Norwegian Government or the court. Hence the Marine average adjuster may seem to be relegated to the place of loss adjuster in the eyes of the non Norwegian assured.

Nonetheless the clear and comprehensive layout of the Norwegian Law in the Plan as against the English law as is contained in various fine printed documents comprising Institute Time Clauses, Liner Negligence Clauses, Additional Perils Clauses and any other additional perils clause, which must be read together with the 1906 Act, court cases and practices, may be preferred. Additionally some of the differences considered to be substantive between the English and Norwegian conditions include:

Hull Conditions : In the definition section of the Norwegian conditions "ship" includes hull and machinery but excludes bunkers and consumable stores, same are however included under the English Conditions, if owned by the assured. By the perils clause of the Norwegian Condition (section 15) the assured is covered for all losses save

those specifically excepted so that there is no danger of a loss being rejected because it was not named in the policy. Under the English Hull Clauses the assured must choose which perils are likely to affect his vessels. Following a loss he must then prove that the loss resulted through the operation of a peril named in the policy.

Agreed Value & Underinsurance: Both sets of conditions provide for agreed values to be conclusive. However, whereas under section 70 of Norwegian conditions general average contributions are based on the actual market value of the vessel, under English conditions contribution is limited to the agreed value in the policy. Hence where the actual value is higher than the agreed value, the insured is treated as being technically under insured for such contributions, although this shortfall may be covered by the British P&I Clubs.

Deductibles: Under Norwegian Conditions the application of a deductible on claims for general average contribution and other costs incurred by the assured to minimise the loss is exempted(189). Under English Condition there is no such exemption although as pointed out, if such conditions serves to exceed the agreed value the recovery will be lessened.

Formerly under English condition there was an additional deductible for machinery damage only where there had been crew negligence. However the new policy form introduced in October 1983 does not include a penalty for crew negligence but there is now a separate Additional Machinery Damage Deductible Clause selectively incorporated with certain appropriate risks. Norwegian Conditions impose a general machinery damage deductible.

Payment On Account: By section 90 of the Norwegian Plan the insurer has a duty to make a payment on account. Under English condition there is no such legal obligation but merely a discretionary exercise on the part of insurer.

Interest On Claims: By section 86 of the Norwegian Plan the assured is entitled to interest on claims (18%) from the expiry of one month from the day on which notification of the claim was sent to insurers. There is no such provision under English Conditions.

Subrogation: By section 96 of the Plan the insured is entitled to share pro rata in any recoveries from third parties... whether or not a full recovery is made by the insurer. Under some English policy conditions the insurer retains all recoveries up to the full claim and only after this will the assured share in any of the recovery.

Cargo Conditions: Both the Norwegian Cargo Conditions and the English Institute Cargo Clauses purport to cover on an "All Risks" basis. They contain similar coverage of risks and expenses. However Section 70 of the Norwegian Plan, to which the Conditions refer, specifically excludes monetary and other consequential losses whereas the English Clauses are silent on this. Section 65 of the Plan, also referred to, implicitly covers constructive total loss which is expressly excluded by Clause 13 of the English conditions.

4.4 Relevance to the Developing Countries:

From the above, one may be concluded that the conditions within the Norwegian Market appears to provide for more benefits to the assured so that the differences would be more than mere form. Further the provision for interest

payment on claims imputes a greater urgency on the part of the Norwegian Market towards the settlement of claims.

The Norwegian Market also seem to offer a more direct and personalised service. However there seems to be a tendency towards the principles of honesty and trust as may be perceived from the claims leader system rather than the more commercially based principle.

The governing laws and conditions of both Markets seem to contain inherent national biases. However the only solution towards curtailing any such biases may lay in recommendations by The UNCTAD Secretariat for the establishment of International Legal Regimes or Conventions relating to Marine Insurance.(3).

Hence although it is now being asserted that conditions of the Norwegian Market are as easily adaptable to the English Market as English Conditions are to the Norwegian Market such adaptation may prove to be disadvantageous to the assured, as in the case of interest payments.

For developing countries to make placements on or to adapt any of the practices of either market ie: the one tried tested and proven and the other new and promising, other considerations such as premium costings, service and flexibility in addition to the age old requirement of continuity and security of course have to be made.

In the final analysis, however, whatever conditions or practices are chosen, and if such are to be fitting to the needs of a developing country then they should at least reflect necessary aspects of legal, social and economic realities of such a country.

(3) UNCTAD Report op cit.

CHAPTER V

THE ECONOMICS OF MARINE INSURANCE

Marine insurance, as has been asserted, being the "backbone" of shipping, is inextricably interdependent upon the fortunes of that industry. The current and prolonged shipping recession therefore naturally affects marine insurance. This chapter therefore seeks to examine the effects of the current situation on the world market with a focus on its impact upon and implication for the developing countries.

5.1 The Demand Side: Marine Insurance Contracts concern the insurance of ships both on the high seas and in coastal waters as well as when laid-up and also of the cargoes they carry. At the national level the demand may be broadly based upon, inter alia, the vessels owned along with such considerations as number, size, type, value and the degree of risk exposure; and the volume of international seaborne trade. Hence a country may not own ships but may still demand marine insurance for the goods it imports or exports.

Fleets- A global view: According to statistical tables produced by Lloyd's Register of Shipping, 1986 saw the largest reduction in the size of the world's merchant fleet in a single year. The tables cover vessels greater than 100grt and exclude sailing ships and non-propelled craft. The world fleet at 30th June 1986 totalled 404.9 million gt, a fall of 11.4 million gt, or 2.7%. The biggest decrease having been suffered by Norway (6 million gt). Countries showing an increase in their fleet included the Phillipines (2.3 million) and the Bahamas (2.1million gt).

Decreases in tonnages were commenced in the early seventies following considerable increases in the price of oil which led to a reduction in shipping occasioned largely by falling demand for oil based products many of which were associated with industrialisation programmes. Tanker tonnages were therefore the first to be reduced.

However, the container vessels which are regarded as being the fastest growing area of maritime transport and although reported to have grown by 23% in the last 2 years are reportedly beginning to show signs of decline in their rate of expansion. (1)

Naturally the international demand for marine insurance has been affected. However, the actual decrease in demand for marine insurance was said to have been cushioned by inflationary trends which obscured a declining rate in real premium growth. (2) Further the erratic pricing of oil since 1982 along with the resultant structural growth crisis being experienced by many countries leads one to conclude that the demand for marine insurance especially in developed economies, is unlikely to rise significantly.

Additionally and besides the problem of genuine reduction in tonnage of traditional maritime countries, there is now a continuing trend for shipowners, especially of developed countries, to use foreign registers or to "flag out" in order to reduce their costs. Such has been the case with Norway for example.

(1) I.Chrzanowski-An Introduction to Shipping Economics 8

(2) Lloyds List June 19, 1986,p.4

On the other hand, developing countries now reportedly possess some 12.5% of the world's tonnage, having doubled their share in the last 10 years. (3) It may of course be inferred that this increasing capacity of developing countries results not so much from any real growth in tonnage as from a transfer of vessels "flagged out" to these countries as a result of less expensive cost operations.

One of the effects of such "transfer" as well as of a genuine increase in tonnage capacity of developing countries, has been to increase the demand of these developing countries for marine insurance. Hence, it has been reported that the annual growth rate of developing countries as revealed by premium remittances, has surpassed that of developed countries.(4)

Arising from such increase in tonnage capacity many developing countries are now active in establishing marine insurance markets of their own in an attempt to replace markets formerly controlled by developed economies some of which have now gone out of business. Re-insurance by way of excess of loss cover is also in heavy demand by insurers from developing countries. However overseas underwriters particularly those in London, are skeptical about such "evergrowing excess of loss re-insurance which is said to be supplanting the traditional forms of participating treaties and which is growing to such a size that it is overshadowing, like

(3) Chrzanowski *supracit*

(4) Lloyd's List Special Report June 19th 1986 p.4

Some monster, the original direct business on which it feeds." (5)

The Supply Side: Supply is normally influenced by the factors affecting demand as well as the level of competition. In view of reducing volume of trade and of consequent vast amount of tonnage lying idle coupled with a decrease in new buildings, marine underwriters are now faced with an oversupply of underwriting capacity. The recession has also meant lower insurance values as shipowners try every means of reducing their running expenses.

Underwriters therefore have to contend with a considerable reduction in the spread of risks needed for a balanced book of business and are consequently faced with the choices of: increasing rates in order to maintain an even keel; or leaving the market; or creating new business or lowering rates in "cut throat" competition.

A number of insurers dealing in international marine insurance have reportedly left the market. The slack created by these withdrawals are said to have been taken over by the London market. With respects to the creation of new business it has been asserted that there are no new type of risks to be created in the future.

Instead some underwriters are said to be venturing into new areas such as residual value insurance which is a type of financial coverage say of mortgage interest, in

(5) Fairplay 27th February, 1986 p. 20

case the vessel has to be sold for less. Other innovative underwriting include the idea of French insurers to launch political risk firms to cover exporters against non payment by purchasers overseas because of acts of their governments. (6)

Yet, there is reportedly, no shortage of worldwide supply capacity for the greatly reduced amount of business on offer. This means that there is a constant downward pressure on rating levels. The international markets appear to be fearful to initiate any increase in rates. Some markets are in fact known to have reduced their rates. An atmosphere of "cut-throat" competition has subsequently been created.

In this atmosphere concern has been expressed regarding the practice for "fleets to be stolen from one market by another with scant respect for rating fundamentals. Many markets are completely ignoring past results when taking business from others. In some cases they do not bother to ask for previous figures."(7)

5.3 The Pricing:

Hence as shipping capacity decreases demand for marine insurance also decreases. However the supply of marine insurance appears to have remained constant thereby causing an atypical fall in pricing. The inevitable fall in required standard of the marine insurance product and of service is therefore not surprising. In ideal market

(6) Lloyd's List 20th February, 1987 p.1

(7) Fairplay, 27th February, 1986 p. 20

conditions for example, a decrease in demand would ultimately lead to a decrease in supply and to an equilibrium or rise in price. It however remains true that the conditions of demand and supply do not exert the usual influence over the pricing or rating of marine insurance.

Such pricing although not freely discussed by underwriters, is said to be dependent upon such factors as type of vessel, size, propelling machinery, flag and classification society, valuation, area of operation, management and past claims experience and prevailing rates of interest. (8) As already stated, the ratings are influenced by the Code of Practice laid down by the Joint Hull Committee.

5.4 Case for the Developing Countries:

As already noted, there is now a tendency for increasing demand for marine insurance amongst developing countries. However, unlike for developed countries where a contraction of international capacity and consequent decrease in demand for marine insurance brought about rate cuts, in developing countries, increases in premium rates were occasioned. (9)

The argument in support of such increased rates is that insurers are unable to offer cheaper rates to cedants of developing countries as reinsurance support for this practice has all but dried up. In the meanwhile, "third

(8) Marit. Pol. Mgmt. 1985 Vol.12 No.1 p.65-68

(9) Lloyd's List June 19, 1986 p.4

world" cedants are still said to be demanding high commission rates and high retention levels which guarantee profits in light of increasing interest rates. (10)

On the other hand the interest rates on the facultative business, premiums and loss reserves are said to be spiralling downwards. Reinsurers in London are therefore said to be "refusing to allow retention of reserves by cedants even where legislation exists requiring cedants to put up deposits based on gross premiums. Retentions are therefore being forced up to a level where the fortunes of cedants and reinsurers are much closer aligned (thereby) forcing cedants onto a facultative market that is not hungry for their business. (11)

"Third world cedants" who had actively participated in international business are therefore said to be largely withdrawing into their "domestic shells". "They have realised that they have been used as innocent capacity. They have paid and will for a long time continue to pay the consequences." They should now only be prepared to write business they truly understand. They must overcome the ignorance of each others market and find a way of writing such business profitably and safely. (12)

(10) op. cit. This would be immediately applicable, for example to, certain brokers/insurers, eg: in St. Kitts & Barbados who now have special contractual arrangements with London brokers whereby they cede risks except those within an agreed value and premium sum in return for a fixed commission rather than a percentage of total premium ceded.

(11) See Lloyd's List June 19 op. cit.

(12) Supracit

The attitude of overseas insurers and reinsurers to this current "forced" choice of developing countries to establish their own markets, is aptly expressed by one of such insurers when he said:

"many participants will have first hand experience of the results of placing their business with security which is unable to meet its obligations. They will appreciate the importance of a reinsurer being able to meet his obligations promptly. Those third world insurers who must seek exchange control authorisation to remit any monies, cannot be viable partners, however strong the political will for co-operation may be. Many third world cedants will not accept the security of the majority of reinsurers from other developing countries." (13)

Faced with this dilemma developing countries have not only been establishing insurance companies but have been coming together to form regional Protection and Indemnity Clubs. One such venture, and which since its formation in 1978 has been lauded for its success, is the Far East Club. This Club provides protection and Indemnity services to owners and operators of vessels and who are domiciled in South East Asia and The Pacific Basin whether such vessels are for deepsea, domestic or short sea trading. (14)

The members "are intent on concentrating resources within the region and have established the use of a network of commercial and legal correspondents possessed of indepth local knowledge and expertise and who provide on the spot

(13) Lloyd's List June 19 op. cit.

(14) Shipping News International, May 1986 p.19

advice and assistance. However they also recognise the need for global support. They have therefore sought to establish treaties and agreements with countries outside of the region. Such agreements are often in the nature of joint ventures in which one of the partners is from a developed maritime industry, often from Scandinavia or Northern Europe. (15)

In summary it could therefore be said that the failure of price response to demand and supply in the marine insurance market pertinent to developing countries is not novel in a market in which price is dependent not so much on the usual forces of demand and supply but moreso on external forces such as claims experience and flag registration and management and more recently rates of interest available on the stock market, it having been asserted that "the markets knell of doom would be heard not with the sound of 100 tankers sinking but of 10 stock markets crashing." (16)

Nonetheless, it would be more difficult for buyers of marine insurance in developing countries to understand the changes in the market forces than it would be for those in developed countries whose managers are more attuned to such changes. Assureds in developing countries are therefore invariably "left out in the cold" and must therefore take what is available from overseas insurers, usually from the developed countries, or must themselves, maybe with the assistance of such other insurers, move towards the establishment of their own marine insurance industries.

(15) Shipping News International op.cit.

(16) Seatrade, August 1983 p. 13

CHAPTER VI

AN ANALYSIS OF CARIBBEAN MARINE INSURANCE MARKETS

6.1 The Approach: As stated earlier, there is no established marine insurance market in the Caribbean. However, as has been asserted, there exists the potential for such a market. This Chapter therefore attempts to support this assertion. This attempt will be based on responses to questionnaires sent out to various entities in the Caribbean and from information received through personal interviews as well as from independent literature.

It must be pointed out that the survey carried out as indicated above, was very limited. This is primarily due to the fact that for the most part only organizations were canvassed so that statistics of individual traders and shipowners are not represented. Also, some organizations did not bother to respond whilst others considered some of the information required to be confidential and therefore did not respond to these.

The approach being adopted here, is firstly to set out, as far as possible, the type and where indicated, the volume of the maritime trade of the designated Caribbean island states; to give, where possible, the quantity insured as well as to identify the market used or to indicate where no insurance on goods has been effected. In examining the hull insurance market, it is intended to list the merchant trading vessels owned both by governments and by individuals where same has been made known through responses to the questionnaire or through Lloyds Register of Ships and of Shipowners or by other means, and

to state the types of vessels; to set out the values of these and, if possible, whether insured, the market used and the premium paid, area of operation and the claims record over a 5 year period, among other things.

It is then proposed to examine the strength of the existing market structure as well as the potentiality of establishing an autonomous market. To this end, not only the facts canvassed by the survey and readings will be used but also empirical evidence such as that garnered from the experience of the Port Authority of Jamaica will be used.

6.2 Cargo Insurance:

Some of the organizations operating in the Caribbean on the cargo side are: The Caribbean Agricultural Trading Company (CATCO) which is based in Guyana and is engaged primarily in the exportation of fresh fruits and vegetables, The Jamaica Commodity Trading Company which is the central co-ordinating body in Jamaica dealing with the importation and exportation of certain commodities and their distribution; Grace Kennedy Shipping (Ja. Ltd) a shipping company having its registered office in Jamaica; Trinidad Cement Ltd. who deal in the wholesale importation and distribution of cement in Trinidad and The Trinidad and Tobago Oil Company Limited.

With the exception of CATCO, no primary information was available in respect of those other organizations. Some information was however obtained pertaining to aspects of the trade of a few of these entities through contact with certain insurance companies, primarily operating overseas. As is generally known to be the case with most developing countries, trading patterns of the companies

identified showed importation to have been effected on the basis of Cost Insurance and Freight (CIF) payment which shows that insurance was actually effected overseas by the seller, whilst exportation was on the basis of Free On Board (FOB) which indicated that even as sellers on the overseas market it was preferred that the buyer overseas effected the necessary insurance overseas.

One of the effects of importing on a CIF basis was perceived from a case on the file of a certain insurance company. This involved loss to cargo so imported into a Caribbean island state, through shortage and or pilferage. The cargo was insured by the sellers through some four or five insurers overseas. The buyers/consignees were not fully cognisant of the extent of the policy of insurance as effected by the sellers. They sought to prove that loss occurred whilst the cargo was still at the risk of the sellers. In addition and in an attempt to further protect their interest they also found it necessary to themselves claim on the port management in the Caribbean which was the final port of destination.

Following investigations by the sellers' overseas insurers it was found that there were shortages due from the buyer's side as well as pilferage possibly from the buyer's side although the port claimed to have taken all reasonable measures to secure the cargo. The sellers' insurers eventually paid the claim. The buyers therefore had to account for payments which were allegedly made by the port management to them or to consignees. It is apparent that in addition to the delays in payment occasioned by the sheer distance of insurers which also resulted in delays in communication there was also a double handling of claims by 1) the sellers insurers and 2) the buyers

who due to insufficient knowledge of the insurance coverage felt compelled to themselves pursue the claim in a further attempt to protect their interest.

An examination of the results of the survey as shown in TABLE 1 overleaf, could lead one to the conclusion that there is an insufficiency of cargo traded to merit the establishment of an autonomous market in this respect. However due considerations being given to the limitations before mentioned and given the nature of Caribbean island states being developing countries who are known to depend heavily on overseas trade it must be imputed that the sufficiency of cargo does exist.

Nonetheless, and as noted before, there is a tendency to shift "the burden" of insurance onto the overseas trader. In fact, there is evidence to suggest that some Caribbean trader may not bother with the question of insurance at all. One trader advised that there were frequent damages to cargo carried but that claims were made by them directly against the carrier.

The tedious process, long delay in obtaining payment and consequential losses which can be occasioned was evidenced from the file of one insurer who was involved in settling such a claim on behalf of the shipowner/carrier. The claim amounted to some US\$6,000 for which the Caribbean shipper took action and had the ship arrested. After lengthy communication between the shipper and the ship and its overseas insurers, the matter ended up in the local Caribbean court. Legal costs were incurred on both sides with the ship claiming on its insurers. In addition and after a period of four years the matter is yet to be settled.

That Caribbean Insurers can in fact rise to the occasion and effect cargo insurance locally may be perceptible from an experience of the Port Authority of Jamaica. The Authority as an importer of heavy machinery and equipment needed for the Kingston Container Terminal was wont to import such cargo on a CIF basis. In recent times however faced with foreign exchange constraint and control The Authority decided to import FOB and to arrange for local insurance. In the first instance, equipment valued over US\$500,000 was to be imported. After some gentle persuasion local insurers accepted the risk. A saving of some US\$90,000, being total premium, was secured locally with a mere US\$2,000 going out as payment for pre-shipment survey fee.

6.3 Hull Insurance:

Both Jamaica and Trinidad and Tobago possess national merchant marines. The Jamaica Merchant Marine (JMM) and JMM Atlantic Line are owned by the Government of Jamaica and operate some 4 vessels one of which was reportedly due to be scrapped. The Port Authority of Jamaica also owns and operates certain harbour vessels which will be the subject of later discussions. There are reportedly other individual owners of ships, notably the Jamaica Cold Storage Ltd.

The Shipping Corporation of Trinidad and Tobago (SCOTT), is a governmental organization which are the registered owners of some two tankers. The Trinidad and Tobago Oil Company Limited (TRINTOC) is also a registered owner of vessels. The Government of Trinidad and Tobago is also itself registered as owning certain ferries and harbour vessels. Barbados has no recorded merchant marine. There is however a suggestion that that government thinks it

more worthwhile to invest the development of ports in addition to its decision to operate an open registry. The Socialist Republic of Guyana is reputed to have a merchant marine. There are recorded in LLOYD'S Register of Ships some seven vessels owned by the Government of Guyana. Two of these are ro-ro carriers and five being general cargo vessels. These are in addition to passenger ferries and harbour vessels owned by the government as well as vessels owned by private shipowners but which are often registered outside of Guyana.

The Caribbean entity, West Indies Shipping Corporation (WISCO), which is a joint venture involving most of the Caribbean governments, also operates some two vessels, one of which has been chartered. In addition to the merchant vessels enumerated, there are also numerous fishing vessels and other crafts, some of which will be listed later.

Of the various entities approached in respect of the mentioned survey, only 3 made positive responses to the questionnaire, so that again required results will be limited.

The record shown in Table 11, even given the limited response, seem to suggest that the dominant insurance market for placement of vessels, is the London Market. Although Barbados indicated that some insurance was done locally, there is no indication of the amount of the risk retained by Barbadian insurers. In the case of Jamaica, the risks indicated to be covered locally involve the local ferries and rescue vessel and mainly includes third party liability damages and not actual hull damages.

There is no official information available from Guyana, however there are unconfirmed reports that almost all marine insurance risks are retained within Guyana through a form of self insurance scheme, especially in respect of Government owned vessels. In Trinidad and Tobago there is reported to be a local company, Consolidated Insurance Company Ltd. which writes marine insurance but which cedes most or all of the risks written to overseas companies, primarily in London.

Therefore there appears to be insurance companies in the region which writes marine insurance. There is Consolidated in Trinidad, Dyoll and others in Jamaica and even a CARICOM company. However the extent to which local economies benefit under present arrangements seem to be very limited. There is evidence to suggest that there is wide scale ceding of insurance and wholesale reinsurance to overseas companies.

In Jamaica for example, local companies were reported in The 1984 Annual Report of The Superintendent of Insurance, as ceding between 48.01% and 95.58% of their total marine aviation and transport business to foreign companies which amounted to some 84.3% of their average gross premium.

One of the purposes of The Office of The Superintendent of Insurance in Jamaica, seems to have been to ensure that a local broker is engaged in placements overseas and that at least a percentage of the premium is retained locally. However the commission of the local brokers usually does not exceed 5% of the total premium with another 12 to 15% being discount on premium, where this is merited, being retained in the local economies.

The recorded ports of registry and consequent flags of the vessels shown are also noteworthy. These range from British through to Panamanian and namedly Caribbean. In this respect, and with the possible exception of Barbados which is now embarking on an open registry policy, none of the other states, now operate a proper shipping register, although some steps are being taken, notably in Trinidad and Tobago and in Jamaica, for such establishment. This could be of grave implication since the operation of a proper register is a prelude to and complementary to the establishment of an autonomous marine insurance industry.

The reported casualties appear to be minimal. The areas of operation of the vessels listed, West Indies and US coast except for the tankers which do some trading on the continent, are relatively safe and so would not adversely affect premium ratings.

Having thus examined the market as it presently exists in the Caribbean it is considered necessary to look at some of the problems affecting placement of insurances as well as the settlement of claims, where same exists. The writer having had practical experience of such problems through cases involving the Port Authority of Jamaica finds it instructive to present a study of such cases.

6.6 CASE OF THE PORT AUTHORITY OF JAMAICA Fleet: The Port Authority of Jamaica (hereinafter referred to as The Port Authority or The Authority) is a statutory organization with responsibilities for, inter alia the management and supervision of all ports and harbours within the island.

As one of the means of carrying out the named responsibilities, The Authority acquired: two tugs, for use within territorial waters with insurance extensions to go within a specified distance outside for the purpose of drydocking one, bouy tender for assistance with placement of bouys and other markings within the harbours one work launch for assisting the bouy tender, one rescue/fire-fighting vessel and one training vessel which is on loan to the Jamaica Maritime Training Institute but for which the Authority maintains full responsibility with respect to insurance.

As part of its function as a Maritime Administration the Authority also operates two passenger ferries which provides a sea link between Kingston and its suburb, Port Royal.

Since 1975 the hull insurances of the Authority, with the exception of the rescue vessel, the training vessel and the ferries which are placed with a local insurer, have been placed on the London Market (Lloyd's and ILU) except for the insurance year 1985 when they were placed on the American Market.

Claims Experience: The claims experience of the Authority on these vessels reveal a history of minor claims which on examination have proven to be less than the policy deductibles. There have been two notable excep-

tions . That involving the Tug " Port Antonio" in June 1982 being engine damage during a towage/salvage operation and subsequently involving a collision whilst being on drydock in Puerto Rico causing damage of over USD 600,000.

Recoveries from this claim are yet to be completed. A part of the claim concerning salvage under a sistership clause was subjected to arbitration and an award handed down in favour of the Authority. The question of denomination of currency is currently being considered for adjudication . Should adjudication be deemed necessary the matter must be argued on both sides by English lawyers in London.

The argument for adjudication is that at the time of the claim the currency was expressed in the policy as being in Jamaican dollars. Therefore, it is further being argued, although the vessel was drydocked in Puerto Rico and all expenditure by the Authority was incurred and paid in US dollars, the entire claim should have been expressed in Jamaican dollars and then converted to US dollars and later English pounds for payment.

This could mean a loss of over some US\$ 60,000 to the Port Authority since at the time of the accident the exchange rate was USD 1= JaD 1.78. Since being in drydock to date the JaD has fallen in excess of USD 1 = JaD4.00.

Any argument by the Authority that US dollars as lawfully earned by them were used to pay the expenses may be thwarted by existing legislation prohibiting the use of such foreign currency except through the Bank of Jamaica which has to approve and authorise all such transactions.

The further question of collision liability for damage to the Puerto Rican pier and to the vessel of a third party is being dealt with by the Authority's P&I Club, British Marine Mutual, as to its one fourth share. The third party is pursuing a claim for alleged non insurance losses. This would then involve another court settlement.

One of the major in-house problem with this claim has to do with failure to produce documents which have been ferried back and forth between the drydock, the Authority and various brokers in Jamaica and in London, and parts of which have been misplaced over the years.

The other claim involved damage to the main engine of the bouy tender, "Jamaica 11" and occurred whilst the insurances were placed on the American Market in June 1985. Again claim for sistership service is being put up for arbitration. This was occassioned by the non familiarty of the Boston based insurers with the Sistership Salvage Clause in the policy and consequent misunderstandings.

A forum for the Arbitration was decided upon by the Authority who showed a preference for London. However the Underwriters, had a preference for The US. In order to try to resolve a deadlock situation and minimise costs, the average adjusters presented a reasoned proposal for salvage service, which is presently being considered.

It is noteworthy that in this case the underwriters agreed to have the vessel's engine dismantled in Jamaica by Jamaican personnel and for the engine only to be taken to the US for repairs. It was then brought back to Jamaica for replacement and re-alignment. In this way

exchange control problems were lessened since underwriters paid for the repairs in the US in US dollars and the Authority consumed the policy deductible through costs incurred in Jamaican dollars.

Prior to the claim the Authority was persuaded by insurers to lower the agreed values on the vessels giving due regard to depreciation factor. However by some subterfuge there was no consequent lowering of the premium. For this insurers advised that a provision of the American market practice was the existence of a minimum premium warranty. The Premium paid by the Authority it was claimed fell within this minimum.

During the 1985 period also, The Authority was advised of a cancellation of their policies by London insurers on the basis of alleged breach of the thirty day premium warranty payment period. Local Brokers however advised that the policies were deliberately removed from the London Market to avert this cancellation since payment could not have been met in time given the system of foreign exchange legislation and control.

Again during 1986, the Authority's overseas placements were repeatedly threatened with cancellation due to difficulties in obtaining foreign exchange approvals in requisite time. This occasioned a loss of some JaD100,000 to The Authority, being the difference between the required premium initially paid over in Jamaican dollars to local brokers and the required sum after exchange approval, by which time the Jamaican dollar had experienced devaluations.

Until 1986 when awards were made for a three year period, brokers were only selected for 1 year at the end of which the portfolio came up for tender again. This could mean a change of broker and in turn insurers every year.

The process of tendering it was observed, did not serve to reduce the premium on the Port Authority's overseas marine hull placements as was anticipated. It has been asserted that this is due to the claims experience.

However the process has involved a total of three different local brokers handling the portfolio over the past 5 years and has also meant 5 different overseas brokers on the hull placements and invariably 3 different overseas leading underwriters.

In fact, in one year there was a total of three brokers on the overseas hull placings: the local broker and two overseas brokers. One overseas broker, The Authority was later advised, specialised in the placement of insurance on race horses (sic). It is implicit that whilst The Placement Committee seemed principally concerned with the "bottom line dollar " figure no similar consideration seems to be paid to the subject matter of the insurance.

The locally insured vessels are used wholly within the limits of the harbour and significantly no claim has ever been recorded against them. The premium payable over the years has not increased greatly except in the case of the training vessel which had undergone substantial repairs and improvement.

In summary it may be stated the The Authority's main problems have been those concerning claims and that of

premium remittance. With respect to claims , this has had to do with the frequency of claims experienced, even though mostly minor, and the length of time for settlement, due mainly to, inter alia, disputes as to policy wordings and the line of intermediaries through which claims documentation have to be passed.

With respect to the number of claims, The Authority carried an investigation and survey which led to the conclusion that the persons handling the vessels, though qualified, were relatively untrained in the handling of such vessels. As a consequence, a person was appointed to oversee the ongoing training of vessel operators as well as to the overall maintenance of the vessels.

The experience of The Authority has shown that during the currency of the policies, wordings may go totally unnoticed, unless and until a claim arises. In fact, in the case involving expression as to currency, even the insurers were unaware of the wordings until some four years after the actual claim and after many payments on account had been made by them in US dollar rating.

Therefore it is now a standing policy of the Authority that all policy documents must be read and agreed by both Authority personnel and the local broker at the beginning of every policy year and the contents confirmed. If policies are not readied at the beginning of the policy year then their content must be confirmed on the basis of the previous policy and alterations and amendments communicated and confirmed.

The tendering process ensure that all portfolios are dealt with through local brokers. The wisdom of this may

have been to ensure that at least a part of overseas premium remains in the local economy. However it also means the likelihood of a change of both local and overseas broker.

In the case involving the Tug "Port Antonio" mentioned, there was a change of both local and overseas brokers as well as a change in the composition of the underwriters handling the claim. Both sets of brokers subsequently lost sight of and interest in the case. Fortunately for The Authority, there was an Average Adjuster in London who is very keen on seeing the final settlement of the claim and who has remained as a link throughout the various claims of The Authority and has often had to go "above and beyond" the duties of adjuster.

It is quickly to be observed that the problems involving the claims experience and settlement of The Authority are by no means novel. They could have occurred in respect of any organization in the world and are possible whether insurance is effected locally or overseas. It is noteworthy that solutions to these problems are within reach even if only over set long term periods.

However the problem involving premiums and premium remittances, though still not novel, especially to developing countries, seem to be virtually insurmountable. Its solution could lay in the inconceivable decision to remove present requirements for approval of foreign exchange on restrictions on same, for overseas premium since this could open a flood gate to the ultimate destruction of the local economy.

Jamaica's trade deficit, for example, has stood at a cri-

tical level since 1975 under the effects of the oil crisis beginning in 1972-3. At 1976 this deficit was some USD350 million with a foreign exchange reserve of minus USD -120 million at 1983 foreign deficit further increased to USD-441.5million, foreign exchange reserve had improved to some USD-93.5 million, however this was largely due to overseas borrowing.(1)

In the meanwhile the Jamaican insurance industry is in a state of expansion. In 1979 the gross premium income from all businesses stood at JaD 105,905 however the net premium to the economy was JaD 51,066. In 1984 the total gross premium income recorded was JaD 297,173,575 of which JaD 8,761,929 was for marine insurance. The total re-insurance ceded was then JaD 139,011,258. Marine Insurance accounted for JaD 6,856,892. (2)

It would therefore seem , at least from the 1984 statistics that more than 78% of the premium income for marine insurance is ceded to overseas companies. This of course means the use of much needed foreign currency.

Whilst the establishment of The Office of the Superintendent of Insurances and The Placement Committee may be seen as means to provide checks and balances in stemming the outflow of such currency, their success at so doing seems from the figures presented to have been very marginal. Instead they have created bottlenecks in the

(1) See Statistical Survey- IMF International Financial Statistics 1984

(2) See Annual Reports of the Superintendent of Insurance (Jamaica) 1981 and 1984.

existing insurance practice in overseas placement.

The cancellation and or threats of cancellation of the Authority's policies due to delays in approvals for remittance of premium as well as the likely and frequent changes of brokers and consequent discontinuity in the placement system, being evidence at issue.

In this regard, the rapidity with which the overseas market moves for cancellation may be indicative of the fact that The Authority and Jamaica in general, as well as other such countries may be viewed as cases involving high moral risks.

Faced with what may be viewed as a "catch 22" situation of having to decide on development of the national economy as a whole through the assistance of premium income from marine insurance placements or continued reliance on the expertise, integrity and long standing tradition to be gained from marine insurance placement in a developed overseas marine insurance market the question must be: Where will we go from here?

TABLE I: Volume of Cargo Traded & Premium

Year	Country	Cargo	Import	Export	Value	Premium
1986	Caricom *(1)					
		Fresh Fruits	-	n/a	US\$3,000	C&F
1985	Jamaica * (2)					
		Bauxite	-	4,426,320tons	-	-
		Sugar	-	149,818	-	-
		Banana	-	12,422	-	-
	(Rapid Sheff.)	Lumber	-	6,778	-	-
	(Carib Cement)	Cement	-	2,953	-	-
	(Esso Antilles)	Chemicals	24,474	-	-	-
	(Ja. Flour Mill)	Grain	17,699	-	-	-
	(Ja. Gypsum)	Gypsum	149,668	-	-	-
	(Wherry Wharf)	Grain	54,563	-	-	-
	(Ja. Co. Trade)	Codfish*	34,000	-	-	FOB
1984	Trinidad & Tobago *(3)					
	T. & T.	Cement	3,000		US\$240,000	C&F

* Source- (1) Caribbean Agricultural Trading Co. (Catco)
 (2) The Port Authority: Dept. Of Research & Special Projects Report, Feb. 4, 1986
 (all units in wharf tons)

(3) Insurers file

n/a = not available

TABLE 11: Ships Owned, MARKET & PREMIUM

Year	Country	No.	Type	Grt	US\$ Value	Market	US\$ Premium
1986	Wisco	2	cargo	4043	5.2m	British	105,000
JAMAICA							
	(Govt)	3	reefer	11284	-	British?	-
	Jmm		cont.		-		
	P.A	4	harbour	462	2.2m	British	299,932
		4	ferry			local	
	other	3	cargo	8235		-	-
TRINIDAD & TOBAGO							
	(Govt)	4	ferries	5217	-	-	-
	SCOTT	4	cargo	21653	48.836m		406,030
	TRIOC.	1	Tanker	2085	-	-	-
		2	tugs	(548)	-	-	-
	NPMC.	1	barge	1400	-	-	-
BARBADOS							
	(Govt.)	2	tugs	(66)	.979m	(Local)	9500
	Seafood	22	fishing	2794	-	-	-
GUYANA							
	(GOVT)	9	ferries	3059			
		5	cargo	2629			
		4	harbour	1500		n/a	
	(Fish.)	21	fishing	2280			
	Nat.Ship	3	cargo	1489			
	Oil Co.	1	Tanker	125			
		1	tug	(100)			

GRAND TOTAL

No.	GRT.	VALUE	PREMIUM
95	68,255tons	US\$ 57.22m	US\$820,462

PS given missing values and other information, above undoubtedly far in excess of figures shown.

CHAPTER VII

SOME CONSIDERATIONS TOWARDS THE DEVELOPMENT OF A CARIBBEAN MARKET

7.1 A Summary:

The foregoing analysis, though limited in its scope, gives an indication of the capacity of the market in terms of trading activities, the absence of any real marine insurance industry and to some extent of the premium outflow. In light of the statistics presented, in-depth consideration must therefore be given as to the volume of the marine insurance business so as to ensure a sufficient spread of risks.

Furthermore, Caribbean shipping management must look to the fact that other classes of business form part of the marine insurance portfolio. The London Market, for example, is not solely concerned with insuring large fleets and eliminating smaller vessels from their account. The shipping industry, after all consists of many other types of vessels not immediately concerned simply with the carriage of cargo. There is therefore the need for the insurance of trawlers and fishing vessels, yachts, salvage tugs and harbour crafts as well as other such vessels which are peripheral to the commercial carriage of cargo.

Nonetheless and bearing in mind, assertions of the intention of Caribbean governments to expand their maritime activities as evinced not only by the fact of establishment of merchant fleet, but also through the development and or expansion of ports and the expressed intentions to establish national registers and to expand intra

regional trade, the establishment of a complementary marine insurance industry must be considered a necessity.

7.2 Insurance Denied: The Experience of Nigeria: The experience of Nigeria fully illustrates the consequences of a developing country not taking the initiative but rather, is forced into establishing a marine insurance industry. It further demonstrates the poignant danger of wholesale dependency upon the international market. A citation of that experience is considered instructive here. (1)

Nigeria experienced an economic boom in about 1976 as a result of the "four fold increase in the price of crude oil, which they supply, during that period. As with most developing countries, this boom was a signal to increase the "consumer spree" in imported items. This led to port congestions and consequent delays in discharge and subsequent pilferage of cargo. This was said to have prompted overseas underwriters, particularly those in London, to issue general cancellations on all open cover insurance written in respect of cargo consignments to Nigeria.

The government of that country was therefore forced to incorporate UNCTAD Resolution 10/vii of 1975 in their Insurance Act thereby making the local placement of marine insurance, especially in relation to cargo, compulsory. The local industry was not prepared for the "precipitous increase in the volume of their marine insurance

(1) See Marine and Aviation Insurance report No. 32 Sept. 1986 p. 18

account which followed. The severe difficulties occasioned in light of the very limited available expertise in the specialised and technical area of marine insurance seemed insurmountable.

Some underwriters then thought it best to re-insure their total marine insurance package. Others were afforded the assistance of overseas partners of foreign subsidiaries where same existed, in tackling the problems. However for the most part the industry was left to grapple with their ignorance and in the hope of bumping into suitable solutions to the problems and consequences of compulsory localization which included:

sharp increases in premium rates resulting in increases in the cost of imported goods which aided increase in inflation rate; circumvention of the market largely by overseas agents and importers who arrange additional insurance and passed the added costs onto local clients; refusal of guarantees given to salvors and claimants by local insurers due to what was perceived as the "overnight rise" of the market and consequent lack of security. Insureds therefore had to "sue and labour" in their own rights leading to expenditure in foreign currency.

In spite of the problems, the Nigerian industry was however said to have benefitted through the expanding underwriting capacity and increased knowledge of marine insurance business. Underwriting companies it was said, were obliged to embark on various types of training programs to improve the quality and strength of their staff. Brokers on whom the bulk of the administrative work fell and whose business and commission rates increased, were also obliged to exert efforts to improve the quality of their expertise.

7.3 Qualification & Training Of Insurance Personnel: The experience of Nigeria ought not to be the Caribbean experience. However too often and for too long , Caribbean insurance personnels have been content to act as mere "post offices" between local assureds and overseas brokers and insurers without themselves being able to contribute meaningfully to the choice or decisions of local assureds. The qualification and training of a marine underwriting sector is therefore vital. Underwriters and brokers alike must be encouraged to participate in educational and training programs. Laws providing for the qualification and registration of brokers and underwriters may have to be enacted where such do not exist and or fortified where they do exist.

Preparing The Support Sector: The insurance support sector comprising such personnels as surveyors, average adjusters and lawyers should also be prepared and trained. Lawyers and other members of the judiciary, for example, must be prepared as marine accidents and damages are likely to happen in local ports and the legal system in such countries may be called upon as the *lex fori* to adjudicate although such incidents may have no bearing on the local marine insurance account.

An example of the urgency for such training was borne out from the file of a certain overseas insurer dealing with a claim arising from alleged damages to cargo in a certain Caribbean port as well as claims for demurrage and arrest of ship. In the first instance, local lawyers who were retained by overseas insurers to represent their interest, insisted that they must be allowed to instruct an English barrister for the purpose of drafting pleading and entering appearance.

Notwithstanding this request being granted, the pre-trial matter was so badly handled by the local lawyers, that the insurers had to retain another law firm from overseas. These latter, in deference to the canon of ethics, declined to relieve the local attorneys of their brief but instead advised that they would "put words in their (local attorneys) mouth" as to how the matter was to be handled.

In the second instance, the judgement of the Admiralty Court was so contrary to sound principles of maritime insurance law that insurers asked local lawyers to comment on it. The lawyers advised that although English laws relating to marine insurance were similar to and to some extent applicable to local laws, local "Judges sometimes misconstrue such laws." Such revelation of course speaks eloquently of the need for training and qualification of lawyers and other legal personnels in the laws relating to marine insurance.

The training and qualification of personnels such as surveyors and adjusters is also vital. There is for example only one known qualified marine surveyor, besides Lloyd's agents and surveyors where they exist, within the Caribbean region. There is therefore an "over-demand" for his services. Again there are no known average adjusters within the region.

7.4 Legislation: With respect to the development of the local industry it may be necessary to enact laws discouraging the wholesale "farming out" of marine insurance account on the overseas market and which leads to the self perpetuating situation of a lack of an established local marine insurance market with sufficient premium

volume, technical "know-how", extensive underwriting capacity and adequate claims servicing and settlement network necessary to the development of the industry.

Hence, whilst laws making for compulsory localization may not be the answer, nonetheless it is being submitted as prudent to have laws, for example, providing for a fixed proportion of the marine insurance account to be placed locally. Whilst of course accepting that localization does not guarantee expertise, it is being further submitted that, at least initially, the admission of outside expertise should be permitted to transact marine insurances. By so doing, the best practice, international techniques and technologies will be made available to the market. Legislative provisions may of course be necessary to regulate the amount of funds that can be repatriated by these personnels or companies.

Reinsurance: It is also recognised that localization does not automatically save on foreign exchange since due to the limited capacity of the market, there will of necessity be reliance on re-insurance which will merely shift the balance of payment burden in this respect. It is further recognised that not only would premiums be kept within the local economies, but so too would claims. This could be very disastrous to such economies in the event of catastrophies.

The continued provision of reinsurance overseas would therefore be necessary. Measures also have to be taken to allow for the formation of treaties overseas as well as to enhance the retention capacity of the local market. Latterly, shipowners, for example, could be encouraged to take higher deductibles on overseas account and to have

local insurers insure a part of such deductible. Increased values on CIF importations, could also be insured locally, where necessary.

Foreign Exchange: Should a regional market be established, the question of premium remittance will of necessity have to be considered, especially in light of the fact that there is no stable foreign currency in the region which could allow for sufficient mobility of funds. The question of how such a regional marine insurance industry is to be organised is a complex one. Believers in the invisible hand may no doubt suggest that it is in fact best to leave things to sort themselves out.

However as the marine insurance industry may be a "long tail" business requiring a long time as well as a wide spread of business in order to realise a profit, all of which requires long term commitment, it may be best for island governments to take the lead in any such establishment.

7.5 Going it alone or Regionalization? There is however the question of hegemony amongst the states, especially in respect of the "bigger islands". However the existence of the regional body Caricom, which, as noted already operates an insurance company, attests to the fact of the possibility of regional co-operation in such a venture. The actual day to day operation of the industry could of course be left to commercial enterprises which could ensure that, at least in the long run, the business will pay its way.

In the alternative and rather than establishing the

industry only through commercial companies, the establishment of regional Protection and Indemnity (P & I) Clubs could be considered. This has been the example in the Far East. Here shipowners and other interests have joined together for the mutual benefit of insuring their "marine adventure". The Far East Clubs, whilst intent on "concentrating their resources within their region, nonetheless, recognise the need for global support in order to provide proper and immediate service to members wherever their trading patterns may take them". (2)

Hence in addition to the various local and regional offices or representatives, and the regional financial and information banks established, the clubs also "encourage the steadily increasing number of joint venture operations throughout the region." One of the partners to such joint ventures is said often to be a Scandinavian company, many of which have, it is said "built up extensive familiarity with the region, and its particular problems and customs". (3)

The germ of the solution to the Caribbean situation may indeed lay in this system which should be thoroughly considered.

(2) See Asian Shipping, November, 1985, p.43

(3) See Shipping News International. 5. 86 p. 19

CHAPTER VIII

CONCLUSION

8.1 Summary:

Marine Insurance undoubtedly bears an intimate relationship to overseas trade. Caribbean islands like the rest of the developing world continue to depend on such trade. However the former reliance on traditional maritime nations for the movement of its trade is slowly loosening, as the developing countries move towards the ownership of means of transportation. The establishment of national merchant fleets are consequently high in priority for many of these nations. In the Caribbean region the case of Jamaica and of Trinidad and Tobago are examples.

The development of ports and facilities is another feature evidencing the emergence of developing countries. The development and heavy investment in The Container and Transshipment port in Jamaica and heavy investment and development of port structures in the rest of the Caribbean region are noteworthy. Not only must the security and safety of such ports be guaranteed but safeguards as are ensured for example, in proper marine insurance practices and a sound legal system, especially with regards to admiralty matters.

Inevitably, the development of such ports and facilities have necessitated investments in modern harbour vessels, rescue vessels and supply vessels in order to facilitate the expected increase in both domestic and foreign trade traffic.

In addition there has been renewed expansion and investments in the tourist trade and fishing industries of the various island states. Attempts at establishing ship-building industry have been made by the Republic of Guyana as evidenced by vessels built by them since 1983 and which have been classed by Bureau Veritas. Some definite steps have been made, notably by Jamaica and Trinidad and Tobago, towards establishing proper national registers whilst Barbados has already established an open register.

Even if recognising that marine insurance is integral to all or any of such developments as mentioned, no Caribbean state has yet moved towards the establishment of a marine insurance industry, save in so far as overseas placement, mainly on the London market is carried out. The consequent reliance on such overseas market has been attributed to many factors. Amongst these are historical and traditional factors, available expertise, continuity and security.

Nonetheless, there is evidence suggesting, for example, that history and tradition have been inconsistent with the present realities of the newly emerging nations such as those in the Caribbean region. The chronic balance of payment problems of these countries, may, ironically, be attributed to the historical and inherent dependence of such countries on the now developed countries from whom they import finished products and export raw materials.

In addition there is the inherent tendency for developing countries to effect such importation on a c.i.f. basis and to export on a f.o.b. basis. This has of course made such countries seemingly committed to the placement of marine insurance overseas and to the payment of already

scarce foreign exchange to overseas insurers.

This is of course a perpetuation of the design of formative years whereby marine insurance was considered as part of the services as was shipping and banking, which were historically connected with the developed economies. Hence the developed markets provided all the services necessary for the smooth functioning of international trade and its finance. Techniques, conditions and practices were tailored to the needs of the industrialised countries.

The adherence, of many countries and with particular reference here to the Caribbean region, to traditional policy forms and conditions which as one British commentator observed, contained words "intended to frighten off other national markets which would have otherwise competed competitively against terms they could understand".(1

The new English policy forms and clauses may be said to represent a break with tradition, at least for the English insurer, as well as an attempt to clarify the marine insurance language which had been in existence for some 200 years. The break has been viewed with suspicion and trepidation not only in developing countries, the USA and Europe but more specifically, by some London brokers, who have been noted to claim that, had they been given "more say" the new cargo clauses, for example, would have been simplified and would have contained fewer exclusions.(2)

(1) Journal of Commerce, Sept, 1983, p2c

(2) Fairplay, 11th Dec; 1986

Concern had even been expressed, as to whether even English lawyers "can be trusted" in correctly interpreting the new clauses. Such trepidation is noteworthy in light of this paper which invites a break with tradition on terms and conditions fitting to the Caribbean reality in their emergence as autonomous nation states.

Available expertise is to be seen as one of the brain-child of history and tradition in the experience of the Caribbean, where as noted before, "The Mother" country was possessed of all the experience and techniques. Such available expertise therefore served to sap the capacity and potential for development from countries which it purportedly served. Security was built up overseas through the secured flow of business from the colonies, as they then were, and continuity thereby guaranteed.

In recent times, there are nations who have challenged or at least, have sought to curtail the, overwhelming influence and especially, of the London Market, on their own national marine insurance industry. These nations then primarily comprised European countries such as France, West Germany and Italy and which had enacted legislation making for compulsory nationalization of the marine insurance industry.

In more recent times, The USA, Japan and Norway, have sought to exert their influence in the international market. The US practises, though largely based on principles established in London, are said to be peculiar to the customs and needs of Americans. As one American insurer is reported to have observed:(3)

(3) The Journal of Commerce, Sept. 8, 1983, p. 20

"American brokers design customised policies for their clients using standard and manuscript clauses providing the level of coverage best suited to respond to the insured's specific needs".

The Japanese market is newly emerging and though accepting some placements from the international markets, remains largely a local/regional concern. The Norwegian market, on the other hand, along with the regional cooperation of The Scandinavian Market Agreement, has now largely emerged from a largely national industry to the stage where it is now accepting large scale international risks.

The relevant laws and conditions of the Norwegian market compare favourably to those of the London market. However many of the conditions even appear to be far more favourable to the insured when compared to similar English provisions, and especially so in relation to hull insurance. Notably amongst these are provisions for compulsory payments on account in the event of a claim falling under the policy and that for payment of interest on claims which not only secure financial benefits to the insured but also serves to ensure the speedy settlement of claims.

Nonetheless, there are certain provisions which still retain distinct local flavouring, such as the Claims leader system, which though appearing desirable for easier settlements lends itself to conflicting interest especially when a non Norwegian assured may be involved.

It had been noted that the Norwegian Market was virtually forced to go international due to a reduction of national

tonnage on which the domestic market had thrived. Such reduction was largely occasioned by the "flagging out" of such tonnage to countries allowing for less expensive operation. Such countries usually operate flags of convenience or open registers. Invariably, these are developing countries, notably amongst which are, Liberia and Panama, and whose tonnages have swelled from such shifts in tonnages.

In an age of disappearing tonnages due largely to vessels being broken up and to a cutback on new ship buildings occasioned mainly by the uncertainties in the oil market which affects the volume of seaborne trade since oil is essential to the process of industrialization, such shifts in tonnages is significant to the marine insurance industry.

On the one hand the decreasing capacity of the developed countries has inversely affected underwriting capacity so that there have been too many underwriters chasing too few ships. The response of the underwriting community has been to resort to cut throat competition "to capture" existing tonnage. This has resulted in unmindful rate cutting and consequent decreasing premiums.

However such decreasing premiums have apparently not filtered through to developing countries, in spite of the shift in tonnages and the ostensible increase in tonnages registered or managed by them. The reasons given for this are many. Notably being the reason that risks from developing countries are almost always placed on a facultative basis, the reinsurance sources for which type of business, it has been said, has all but "dried up".

Developing countries have therefore found that they have been "used as innocent capacity" and are now being abandoned in favour of more stable business.

The implication of all this is tremendous to the Caribbean. It is true that the Caribbean has not benefitted directly from the transfer of tonnages, although Bahamas and recently Barbados have established open registers. However, the case of Nigeria as cited herein, points to the danger of wholesale dependence on overseas insurers who may have just cause or otherwise, find it necessary to suspend or cancel all insurance coverage within a particular country, as was the experience of Nigeria.

One may be tempted to conclude that the Caribbean does not possess a sufficiency of cargo or ship tonnage to make a strong enough case for the establishment of an autonomous marine insurance industry for the Caribbean. There are even those who will suggest, that the absence of a mature marine insurance market is proof that it is not a viable idea. Nonetheless the figures shown in Tables 1 and 2 herein, though limited in scope, does indicate the existence of a sufficiency of tonnage. Again the likely outflow of premium even from such small Caribbean entities as shown, does recommend the establishment of a market as is proposed by this paper.

Further, and it is the assertion of this paper, that the underdevelopment of local marine insurance markets is the consequence rather than the cause of the fact that an insufficient volume of marine business is placed in the local markets. It is therefore the considered opinion of the writer that should the Caribbean islands, as should any other developing country succeed in breaking the

vicious circle and secure for its national marine insurance market a constant flow of a large volume of business, namely, the bulk of the cover for a considerable volume of foreign trade, this market would gradually overcome its traditional weaknesses and develop into a stable marine insurance market providing both adequate cover at fair prices and satisfactory services.

8.2 Recommendations:

Given the potentiality, which one would like to think has been evidenced herein, for a vibrant local marine insurance market, the following recommendations and suggestions have been made. Firstly, that an assessment of the full capacity of the market be taken by way of an in-depth analysis and feasibility study, preferably on a government to government basis.

Further, the opinion has been expressed that the fundamental changes that would be necessitated, should a regional marine insurance industry be considered, may not be achievable without the intervention of government. Caricom it has been suggested, could be used as a vehicle for such changes, and especially since this regional body is already involved in the ownership of insurance concerns.

The intervention of government, if deemed necessary, need not take the form of compulsory legislations towards localization so as to conflict with time honoured policy of laissez faire. Ship and cargo owners therefore need not be compelled to insure their vessels with the regional company. However it is considered that if such a company is properly administered and security can be built up and guaranteed then combined with proximity and

local pride the shipping community would be influenced to support such a company.

Again it has been suggested that such a body need not take the form of commercial companies but may be set up as local or regional P.& I. Clubs, as has been the experience of the marine insurance industry in the Far East. In this case the role of governments may be considerably limited. Joint ventures with companies outside the region may also be desired in this respect.

It has further been recommended that, given the limited or lack of expertise, the entry of specialist with interest to actively participate in such local or regional industry should be encouraged so as to make the best international techniques and technology available to the market. It may of course then be necessary to enact legislation governing such participation as has been suggested.

However, the almost immediate need for the proper training and qualification of marine insurance personnels, insurers and brokers alike as well as lawyers, average adjusters and surveyors, cannot be overly emphasised. These persons must of course be prepared and ready, even if the proposal for the establishment of an indigenous marine insurance industry, becomes a pipe dream.

As long as shipping is encouraged on the waters of the Caribbean, Caribbean personnel must be prepared to protect all interests associated with such shipping. The interest of importance to this paper being that of marine insurance. This may involve the securing of proper insurance coverage on cargo imports; or the ability to

properly represent ships which have in some way been invited to trade in the region. This may have resulted either through such ships having been arrested or having otherwise become involved in litigation involving marine insurance issues and local courts are called upon to adjudicate as *lex fori*.

Caribbean vessels or cargo become subjects of litigation or other proceedings involving marine insurance issues overseas, necessitating Caribbean personnels to make representations, then it will not be necessary for example, for outside lawyers to be used to "put words into the mouths of local personnels."

Further, and as already stated, in order to strengthen and develop the capacity of the market, the enactment of legislation providing, for example, for the placement of a fixed proportion of local marine insurance business to be effected locally may be necessary.

8.3 Problems & Challenges for the Future:

A primary problem is that involving the question of payment currency which would have to be considered given the lack of a "hard" and stable currency within the region.

The current British originated Laws may be said to form a basis for the apparent unification of Caribbean Marine Insurance Laws and for their general international acceptability. In the absence of an International Convention governing Marine Insurance as is being proposed by UNCTAD and being careful to avoid any suggestion which would have the effect of allegorically "throwing out the baby with the bath water", such laws may well have to be accepted. Nonetheless their review

may be considered necessary.

In respect of the structure and conditions for the market and whilst recognising that the British market conditions, laws and practices have historically served the interest of the Caribbean marine insurance business and though accepting that tradition commands respect, it is being submitted that tradition should not be so slavishly followed as to become a restrictive influence on development. The past must not be permitted to hold too firm a hand over the present.

The Caribbean region is moving towards establishing itself as an autonomous maritime centre. Bold steps have already been taken towards this end despite and inspite of the uncertainties of the shipping industry. In the meanwhile, as hereinbefore suggested, the traditional overseas marine insurance market seem at this time, geared to fully protect the interest of their own assureds.

The establishment and development of a marine insurance industry in the region is necessary and inevitable as a means of safeguarding the interest involved in and as a complement to the development of a maritime centre as proposed. Establishment of such an industry will no doubt require, to use the words of the general manager of The Port Authority of Jamaica in speaking on port development, and which are considered applicable here, given similar uncertainties:

"...an act of faith and perception at the beginning..."
the continuing development of which should be able to
capitalise on the initial advantage so as to meet
expected demand "justifying such boldness and foresight."
(4)

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ANNEXES

Disponentgatan 6/309

S-21157 Malmo .

Sweden.

20th May, 1986.

Dear Sir/Madam,

The attached questionnaire is in respect of a survey being undertaken in pursuance of post graduate studies and for the purpose of preparing a thesis concerning the establishment of a marine insurance industry in the Caribbean Region.

The writer is a Jamaican and served as legal officer to the Port Authority of Jamaica immediately prior to attendance at The World Maritime University in Malmo, Sweden.

Your kind assistance in completing the questionnaire is being solicited and would be greatly appreciated. You may return the completed questionnaire or direct any questions or comments on same by or before September, 1986:

c/o Miss Luci Kitchin

The Port Authority of Jamaica
15-17 Duke Street, Kingston,
Jamaica, West Indies.

Thank you.

Yours Sincerely,

Carrol Pickersgill.

QUESTIONNAIRE

(Traders)

(PLEASE TICK WHERE APPROPRIATE)

1. Type of business operated?
2. Trading Region? CARICOM/U.K./NORTH AMERICA/OTHER
3. How are goods Transported? SEA/LAND/AIR/OTHER
4. Carrier regularly used?
5. Average value of goods? US\$.....
6. How are goods bought/sold CIF/C&F/FOB/OTHER
7. Average Insurance Premium? US\$.....
8. Claims on insurers
over last 5 years? AMOUNT..... NATURE.....
.....
.....
COMPANY.....
SIGNATURE.....

LIST OF CARIBBEAN ISLANDS
WITH
MAJOR SHIPOWNING, SHIPBUILDING AND REPAIRING COMPANIES

The Caribbean Islands

This section focuses on the Caribbean Islands and includes all major shipowning, shipbuilding and repairing companies. It also lists major ports, government bodies and organizations. The list of shipowners include only those companies not operating open registry tonnage and vessels of a 1 000grt and above as of September 30, 1985.

Fleet information is shown as follows:
Name, type of ship, year of build, gross and deadweight tonnages.

Abbreviations: bc bulk carrier, cc cement carrier, ct chemical tanker, cv container vessel, fy ferry, gc general cargo, lv livestock carrier, ol oil tanker, pc part container, rf reefer, ro/ro.

REGIONAL BODIES

CARIBBEAN COMMUNITY SECRETARIAT (CARICOM)
PO Box 10827, Georgetown, Guyana
Tel: 69280/89
Telex: 2263 caribec gy
Cable: Caribsec guyana
Secretary general: Roderick Rainford

CARIBBEAN DEVELOPMENT BANK
PO Box 406, Wildey, St Michael, Barbados
Tel: 426-1152
Telex: 2287 caribant wb
President: William Demas

CARIBBEAN SHIPPING ASSOCIATION
Secretariat: PO Box 40, Kingston
Tel: 922-8270
Telex: 2431 cariship ja
Cable: Carogram Ja
President: Ernest Girod
Vice president: Bernard Fernandes
Executive vice president: Alvin Henry
Regional body comprising shipowners, port authorities and service companies such as agents and stevedores, which promotes the interests of the shipping industry.

NAVIERA MULTINACIONAL DEL CARIBE (NAMUCAR)
Quinta Entrada de Los Yoses, 50 metros al sur, San José, Costa Rica
Tel: 25-6277
Telex: 2463 namucar cr
Cable: Namucar
President: Rodolfo F. Valdez
Manager: Luis F. Chavez Villanueva
Namucar is a multinational shipping line established in 1975 by Costa Rica, Cuba, Jamaica, Mexico, Nicaragua, Trinidad and Tobago and Venezuela although Trinidad pulled out some years later. Namucar's two vessels are Panamanian flag.

WEST INDIES SHIPPING CORPORATION
For details see under Trinidad & Tobago

ANGUILLA

This small British dependency is situated some 70 miles northwest of St Kitts at the northern end of the Eastern Caribbean island chain. Formerly linked politically to St Kitts-Nevis, Anguilla broke away with final separation granted in 1980. The

island has a population of about 7 000 and its limited economy is based on the export of salt to Trinidad for use in the oil industry and lobsters to Puerto Rico and the US. Tourism is also being developed. Limited port facilities are available at Road Bay.

ANTIGUA

Part of the Leeward Islands. Antigua has an area of 108 miles² and a population of some 80 000. It is linked as a political group with the smaller islands of Barbuda and Redonda. The island whose capital is St John's, became independent from the UK in 1981. Well served by air links from the US, Canada and the UK, tourism is the prime element of the economy, although cotton and rum are exported.

ANTIGUA SHIPPING ASSOCIATION
St John's

ANTIGUA CHAMBER OF COMMERCE
Church St, St John's

ANTIGUA SLIPWAY LTD
English Harbor
Facilities: 150 ton slipway

CRABBS SLIPWAY & MARINA
Parham Harbor
Facilities: Lifting equipment up to 250 tons.

ANTIGUA & BARBUDA PORT AUTHORITY
Deep Water Harbor, PO Box 1052, St John's, Antigua
Tel: (46) 20050/3, 21273
Telex: 2179 anport ak
Port director: Emil Sweeney
Port manager: G.W. Benjamin
Facilities: Deep water harbor consists of a 1 200ft dock with 35ft alongside. There is a warehouse and ro/ro vessels can be handled. A bunkering terminal is adjacent to the refinery of the West Indies Oil Co Ltd and there are also two tanker berths. A cement dock with bulk handling equipment is situated at Crabbs Peninsula. Total traffic through the port amounted to 119 900 tons in 1984 of which imports accounted for 108 331 tons and exports 11 568 tons. Of imports container cargo totalled 57 383 tons which compares with 46 196 tons in 1983 and 41 844 in 1982. Over the same period breakbulk imports declined from 57 079 tons in 1982 to 50 948 tons last year. Containerized exports at 7 864 tons showed a small fall over 1983 but both these years were up on 1982 when only 3 819 tons were moved in containers. Breakbulk exports fell from 6 361 tons in 1982 to 3 704 tons in 1984.

BAHAMAS

Consisting of some 700 islands of which only about 30 are inhabited, the Bahamas stretch from the coast of Florida in the north almost to the coast of Haiti in the south. The population is 240 000 and collectively the islands make up an area of 5 382 miles². Nassau, on New Providence

Island, is the capital and one of the two main ports, the other being Freeport on Grand Bahama Island. Apart from these, many other islands have facilities for handling ferries or fishing vessels.

Tourism is the mainstay of the economy with over 2mn visitors each year. After tourism, banking is the most significant economic activity. Drug smuggling, which was next in line, is now under much pressure from the Bahamian and US authorities. Agriculture and the shipping registry are two other important elements with fruit and vegetables accounting for over half of the former. Tourism accounts for almost two thirds of the working population. Industry at Freeport includes a cement plant, oil refinery and pharmaceuticals factory. On Andros island aragonite is mined for export to the US and other countries.

GOVT. ORGANISATIONS & ASSOCIATIONS

MINISTRY OF TRANSPORT—MARITIME DIVISION
PO Box N3008, Nassau
Tel: (32) 28108 51903
Telex: Nassau NS20263
Minister of transport: Philip M. Bethel
Director of maritime affairs: Captain William H. Stoodley
Branches (Shipping registry): London and New York

The ministry's main maritime function is to administer the Bahamian flag registry which over recent years has been steadily increasing in size. The registry was started in 1976 and since the passing of the Merchant Shipping (Amendment) Act in 1982, which clarified many technical matters and made changes about the control of foreign-owned Bahamian flag vessels during national emergency, more tonnage has been attracted.

Bahamas registry

Year	No	Grt
1979	7	21 615
1980	14	21 763
1981	43	172 705
1982	39	282 983
1983	52	2 042 364
1984	50	1 115 156
1985 (to 24.10.85)	74	1 118 462

1985 figure to 24.10.85

SHIPREPAIRERS

L & A INDUSTRIES LTD
PO Box F2580, Freeport, Grand Bahama
Tel: (352) 5422, 2600
Telex: c/o BATELCO Area Code 297
Booth FPO 51
President: Luciano Borsetto
Vice president: Edmund Hanna

LUCAYA ENGINEERING
PO Box F 2935, Freeport
Tel: (352) 6239, 6882

NASSAU SHIPYARDS LTD
601 Bay Street, PO Box N 3709, Nassau
Tel: (32) 23041 Telex: 20394 nas ship
Chairman: Lady M.F. Symonette
Managing director: R.D. MacKean
Marketing sales director: G. Pinder
Facilities: Two marine railways of 150 tons and 600 tons capacity.

PORTS

BURMAH OIL BAHAMAS LTD
PO Box F2530, Freeport
Tel: 348-3471 Telex: 30067
Marine operations manager: J.B. Moncrieff

Operators of the South Riding Point offshore transshipment terminal. This terminal offers a sea island and dredged harbor some 35 miles to the west of Freeport.

FREEPORT HARBOUR CO LTD
PO Box F2465, Freeport, Grand Bahama
Tel: 352-29651 Telex: 30020
Port director: J. Hinchliffe
Assistant port directors: J. Ritchie, C. Curtis

Freeport is the second most populous town in the Bahamas with a population of some 33 000.

Facilities: The port consists of four basins and a main wharf. Basin 1 is 700 x 350 x 600ft with a depth of 28ft. It is mainly used by cruise vessels and ro/ro's (two ramps available). Basin 2 is 1 200 x 350 x 960ft and is used by cruise ships, ro/ro's and lpg carriers. The ro/ro ramp is 150ft wide. Depth in basin 30ft. Basin 3 is 1 365 x 350 x 635ft and this is operated by the Bahamas Cement Co. Depth in basin 30ft. Basin 4 is not yet in full use but will be 940 x 350 x 657ft. It will include a 600ft cruise ship berth. The main wharf is 1 050ft long and used mainly by cruise and cargo vessels.

Two offshore oil jetties owned by the Bahamas Oil Refining Co offer berths for tankers up to 500 000dwt. Depths available between 60 and 96ft.

NASSAU PORT AUTHORITY
Prince George Wharf, PO Box 1417, Nassau

1985 figure to 24.10.85
Tel: (32) 28832, 22049
Port controller: Leon H. Flowers
Nassau is one of the two major cargo and passenger ports in the Bahamas.

Facilities: Some ten berths at three docks are available with depths between 12 and 36ft. Five of these can handle containerhips. Containerized cargo totalled 152 000 tons in 1983 (32 000TEUs) of which imports accounted for 150 000 tons. Tankers can be handled at Clifton pier in the southwestern part of New Providence island.

BARBADOS

The most easterly of the Caribbean islands, Barbados has a land area of 166 miles² and a population in the region of 250 000. Barbados is served by good air communications and its road network extends to some 840 miles of which 780 miles are asphalted. Bridgetown is the capital and main port. The island's economy is relatively widely based for a Caribbean country with tourism being the most important element followed by manufacturing and sugar. Last year the economy grew by 2.5% following a zero increase in 1983 and a 4.6% decline in 1982. Tourism increased by 11% in 1984 and the manufacturing sector, which generated earnings of \$97mn last year and had been expanding, is now suffering from protectionism from Trinidad &

Barbados continued

Tobago, one of its most important markets after the US. Sugar exports in 1984 amounted to 79 725 tonnes out of a total crop of 100 506 tonnes, a rise of 18% on 1983. These exports brought the economy \$32mn.

Apart from the port, Barbados has a small shipping registry which in September 1985 number 41 vessels including three ships owned by the West Indies Shipping Corporation (which see under Trinidad)

GOVT. ORGANISATIONS & ASSOCIATIONS

MINISTRY OF TRANSPORT & WORKS—DIVISION OF MARITIME AFFAIRS

PO Box 25, The Pine, St Michael
Tel: 429 2191, 429 8633
Director: WB 2222
Telefax: 2222
Telephone maritime affairs: Keith A. Hall

SHIPPING ASSOCIATION OF BARBADOS

1st Fl, Speedbird Hse, Fairchild St, Bridgetown
Tel: 798604
This body has as its members agents, stevedores, shipping lines and other port interests. It is affiliated to the Caribbean Shipping Association.

BARBADOS PORT AUTHORITY

University Row, St Michael
Tel: 42-61030/61037
Telefax: 2367, portman wb
Chairman: H B. Niblock
General manager: P.B. Parker
To combat stagnation in the shipping sector, the Barbados Port Authority is pursuing a strategy of reducing costs, diversifying to include the provision of facilities for yachts and fishing craft and making efforts to attract more cruise ships to the port. The decline is reflected in the following traffic figures.

Barbados Port Traffic

Year	Tonnage handled
1982	486 979
1983	440 504
1984	436 723

Part of the decline is due to the opening of a cement plant in Barbados which reduced imports. Other bulk commodity tonnages also declined except for sugar and molasses which recorded a 28.4% increase over 1983. Container traffic fell to 13 849TEUs compared with 14 989 in 1983 and 13 360 in 1982. The port authority is providing more container storage facilities especially for transhipment boxes and investing in new equipment including a gantry crane and two straddle carriers.

As part of the bid to attract more cruiserships, Bds\$1.4mn has been invested to improve facilities for passengers. Last year saw a drop of 15 vessels to 177 in the number of cruiserships calling at Barbados. The number of passengers fell from 126 930 in 1983 to 111 025.

Facilities: Protected by a 3 000ft breakwater, the port of Bridgetown provides eight berths for deepsea vessels including three for cruiserships, one for bulk sugar exports, one for containerships (590ft long), two for general cargo and one for bulk cargoes (grain and flour). There is also a shallow draught wharf for local trading and coastal vessels and a tanker terminal operated by Esso. The main port area is dredged to 32ft and the grain berth to 36ft.

BERMUDA

Situated some 600 miles off the US East Coast, Bermuda is the main island in a grouping of about 100 islands of which 20 are inhabited. The population numbers about 60 000 and the economy is based largely on tourism and foreign offshore business operations.

Bermuda's political status is as a Crown colony of the UK with self internal

government. In 1982 the total number of tourists was 544 466 representing a rise of 1.7% on 1981. Of those 124 178 were cruise passengers.

There are three port terminals in Bermuda, Hamilton (the capital), St George's and Freeport. All three are controlled by the Department of Marine & Port Services. Cruiseships account for much traffic but container and ro/ro facilities are also available.

As an open registry country Bermuda has had a fluctuating time with the fleet having fallen significantly at the start of the 1980s although the last year has shown some recovery. The size of the registry as at December 31 since 1976 is shown below.

Bermuda registry

Year	No	Grt
1976	88	1 590 288
1977	124	1 940 507
1978	125	1 931 356
1979	124	1 839 521
1980	78	662 543
1981	71	490 996
1982	63	654 029
1983	70	826 021
1984	68	731 766
1985	75	893 610

1985 figure to 5.9.85

GOVT. ORGANISATIONS & ASSOCIATIONS

BERMUDA SHIPPING ASSOCIATION

PO Box 377, Hamilton 5
Tel: (809-29) 32366
Telefax: (290) 2359
Organisation of five companies providing agency and stevedoring services. Affiliated to the Caribbean Shipping Association.

REGISTRY OF SHIPPING

PO Box 1628, Hamilton 5
Tel: 57251, 57306
Telefax: 3505 rgshp ba

SHIPOWNERS

BERMUDA CONTAINER LINE LTD

c/o Container Shipping Management Ltd, PO Box 838, 99 Front St., Hamilton 5
Tel: 295-1624
Telefax: 3224
President: Gilbert Darrell
Joint managing directors: H.H. Outerbridge, W.J. Brewer

Bermuda Container Line (BCL), formed in 1980, employs one owned and one chartered vessel to operate its container services to the US. The owned vessel Oleander, has a TEU capacity of 189 and the chartered (from Sea Containers) Bermudiana can carry 124TEUs. The company made a loss last year of \$184 394 compared with a profit of \$821 727 the year previous. The loss was due in part to competition with Bermuda International Shipping Ltd on the Jacksonville route and to overcome this problem the two companies are merging their activities. A return to profitability is anticipated for BCL in 1986. Revenue of BCL increased to \$15mn last year from \$13.9mn in 1983 and operating expenses rose from \$12.5mn to \$14.5mn over the same period.

Services: Two pn weekly frequencies linking Hamilton with Jacksonville and Port Elizabeth.

Fleet
Oleander cv 78 2612 1571

SHIPREPAIRERS

W.M.E. MEYER & CO LTD

PO Box 20, St George's
Tel: 71712
Facilities: 600 ton capacity slipway.

BERMUDA MACHINE & CASTINGS LTD

PO Box 20, Cut Road, St George's
Tel: 71712
Chairman: Colonel J.B. Tucker
Managing director: Mrs G. Henning

PORTS

DEPARTMENT OF MARINE & PORTS SERVICES

PO Box 180, Hamilton 5
Tel: 56575 Telefax: 3505 rgshp ba
Director: Captain K.G.R. Hallam
The main functions of the Department of Marine & Port Services is as authority for the island's ports and management of the shipping registry. Hamilton is the major port with St George's being an important cruise terminal.

Facilities:
Hamilton: Five berths up to 650ft long and depth alongside of 26ft. These are used 7/8 by cruiseships and container berths 7/8 offer both ro/ro and although handling facilities.

St George's: 1 030ft of quay with a depth of 30ft. Also tanker berth for vessels up to 750ft.
Freeport: 1 900ft of quay available in two basins with 30ft depth.

A recent investigation by Ports Canada into the operation of Bermuda's ports, recommends the upgrading of present cargo handling facilities. Two options are put forward one costing \$11-15mn and the second \$22-25mn. Both would increase the current cargo working area from six acres to the suggested 15 acres which should be available for handling the 250 000 tons a year passing through Hamilton. A long term solution to the congestion is the construction of a 25-50 acre container facility.

CAYMAN ISLANDS

The Caymans consist of three islands—Grand Cayman, Little Cayman and Cayman Brac—totaling about 100 miles. Georgetown, on Grand Cayman, is both the capital and main port. The population of the islands is in excess of 18 000 and tourism, offshore banking and insurance are the backbone of the economy. In 1984 some 19 000 companies had domicile in the Caymans.

The Caymans also operate a shipping registry based on the British flag but with certain financial and tax advantages. The following table shows the size of this registry over recent years.

Cayman registry

Year	No	Grt
1978	307	170 220
1979	403	228 889
1980	514	260 843
1981	518	252 322
1982	627	287 385
1983	627	317 484
1984	596	253 643

GOVT. ORGANISATIONS & ASSOCIATIONS

REGISTRAR OF BRITISH SHIPS

Government Administration Bldg, Georgetown
Tel: 94844, 97900 Telefax: 4260 cigout cp

PORTS

CAYMAN HARBOR CORP LTD

PO Box 1358, Harbor Drive, Georgetown
Tel: 949-2055, 2228 Telefax: 4340 chc cp
Branch office: PO Box 50, Cayman Brac
Port director: Basil Hennings
Director of port operations: Brent Bush
This corporation serves as the authority for the ports of Georgetown and Cayman Brac although the latter is operated by Cayman Energy Ltd (which see). The Corporation was formed in 1976 as a port management agency.

Facilities: Georgetown has two wharves providing a total of 850ft of quay and including three ro/ro ramps. Depths alongside vary up to 26ft. Containers are handled by forklift trucks.

CAYMAN ENERGY LTD

PO Box 33, Cayman Brac
Tel: 4350 celcb cp

Facilities: Two berths each 200ft long with depth alongside up to 16ft. Facilities also for handling ro/ro and container vessels. Cayman Energy operate a oil transhipment service between Cayman Brac and Little Cayman

SHIPOWNERS

HYBUR LINES

PO Box 190, Georgetown
General agents: Hyde Shipping Corp, 3033 NW N River Drive, Miami, Fl 33141, USA
Tel: (305) 638-4262 Telefax: 522867
In addition to vessels below, the fleet includes Hybur Sun and Hybur Traveller, both under 1 000grt.

Services: Weekly—Cayman to Miami plus fortnightly calls at Limon and Cristobal. Fortnightly—Belize to Miami and Belize to Gulfport.

Fleet
Hybur Clipper cv 70 1 599 2 210
Hybur Intrepid cv 71 1 599 2 177
Hybur Star cv 62 1 074 1 574
Total: 3 vessels, 4 272grt, 5 961dwt

KIRKCONNELL R.B. & BROTHER LTD

PO Box 1372, Georgetown
Tel: 9494472 Telefax: 4307 kirkline cp
Managing director: Barton Kirkconnell
Services: Cayman to Jamaica, Haiti and Miami weekly.
Fleet
Kirk Express ro 68 588 3 967

CUBA

The largest and most populous island in the Caribbean Sea, Cuba lies to the south of Florida and north of Jamaica. It has a total area of some 44 200 miles² and a population of 9.8mn. Economically the country has been trying to move away from a dependence on sugar but the latter still accounts for between 75% and 80% of exports and foreign exchange earnings. Next in line is nickel with some 6%. Machinery and transport equipment, at some 33%, is the largest import item followed by oil at over 20% and food at 17%. The Comecon countries are Cuba's largest trading partners accounting for some 85% of its exports and similar level of imports. Over recent years Cuba has shown a growth rate of 4% to 5%. The country has a relatively low level of debt compared to many Latin American countries although some rescheduling has taken place over the past two years.

Increasingly Cuba is trying to expand its tourist industry and strengthen its economic ties with the West in a bid to attract foreign investment. Its future performance centers on the size of the sugar crop and its export value in world markets.

Cuba's merchant marine continues to expand, albeit at a slow rate.

Cuba is taking delivery through 1985 and 1986 of eight 16 000dwt multi-purpose cargo vessels being built in Spain by Astilleros Espanoles (AESAs). The vessels are being built to the order of a AESA subsidiary and then bareboat chartered to Mambisa with an option to purchase. Four 15 000dwt cargo vessels are also being constructed in the UK by Smith's Dock to join Cuba's flag of convenience fleet. These will be completed in 1986.

Port development over recent years has included the building of bulk sugar handling facilities at a number of ports and the construction of container and ro/ro terminals.

GOVT. ORGANISATIONS & ASSOCIATIONS

CUBANA DE FLETES (CUFLET)

Oficios 170, Teniente Rey y Amargura, Havana
Tel: 6-7355, 6-5262
Telefax: 51-1167 celcb cu; 51-2102 cuflet
Director: Orlando Borrego Diaz

EMPRESA CONSIGNATARIA MAMBISA

Oficios & Amargura, José María Pérez Bldg, 2A, Havana
Tel: 62 1960
Director: Julio Ara Prado
State shipping agency and ship supplier.

Cuba continued

Fleet development 1.1.76-85 (vessels over 1 000grt)

Year	No	Grt	% state owned	No. of owners	Ave age (years)	Orderbook grt % national shipyards
1976	86	463 890	100	4	10.8	185 354(-)
1977	98	524 604	100	5	10.3	189 640(-)
1978	110	636 801	100	3	8.5	67 946(-)
1979	81	604 066	100	3	9.3	-
1980	84	642 173	100	3	9.8	-
1981	88	680 805	100	3	10.1	3 448(-)
1982	93	731 618	100	3	10.5	4 000(-)
1983	97	729 603	100	3	10.5	25 500(-)
1984	100	740 139	100	3	11.3	21 748(-)
1985	102	747 127	100	3	12.2	15 000(-)

Source: IEMMI, Buenos Aires

Cuban fleet by flag of registry and total tonnage (at January 1985)

Country of registry	No	Grt	Dwt	% of total fleet
Panama	9	81 590	127 467	9.7
Greece	1	16 989	26 937	2.0
Sub total	10	98 579	154 404	11.7
Cuba	102	747 127	1 024 017	88.3
Total	112	845 700	1 178 421	100.0

Source: IEMMI 1985

INSTITUTO DE INVESTIGACIONES DEL TRANSPORTE

Carretera del Asilo, Finca Tiscornia, Casablanca, Havana
Tel: 61-6941, 7032
Director: Manuel Alepuz Llanzana

MINISTERIO DE TRANSPORTE—MITRANS

Rancho Boyeros & Tulipán, 1 Fl. Havana
Tel: 79-2440
Telex: 51-1135 1350 mtran cu
Vice minister, merchant marine: Raúl González Tapia

REGISTRO CUBANO DE BUQUES

Quinto Avenida 1101 & calle 112, Playa, Havana
Tel: 28964
Director: Pedro García Medina
The Cuban register of ships.

SHIPOWNERS

EMPRESA DE NAVEGACIÓN CARIBÉ

Lamparilla 2 Oficios, José María Pérez Bldg, 4th Fl. Havana
Tel: 61-4189, 62-3605
Telex: 51-1398 enc cu
Director: Arnoldo Menéndez Tommashevich
Operator of domestic and Caribbean passenger and cargo services. Also tanker owner.
Fleet

Las Villas	gc	59	3 142	4 168
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EMPRESA DE NAVEGACIÓN MAMBISA

San Ignacio 104, Obispo & O'Reilly, Havana
Tel: 6-5124
Telex: 51-1131, 51-1810 mambi cu
Director: Jorge Fernández Cabrera
Mambisa provides liner services to the Far East, Canada, N Europe, the Baltic, Mediterranean, Black Sea, N Pacific ports of S America and Argentina. It also operates bulk carriers.
Fleet

Abel	gc	71	12 953	16 780
Alegria de Pio	pc	80	9 156	14 854
Antonio	gc	83	11 980	15 940
Antonio Maceo	bc	81	16 988	25 401
Arsacelo	gc	77	10 857	15 213
Iglesiás	gc	69	10 972	15 799
Bahía de Cochinos	gc	66	9 390	13 853
Bartolome	pc	76	2 230	15 088
Batala de Santa Clara	rf	75	1 327	1 613
Batala de Yaguajay	rf	76	1 327	1 613
Callisto García	gc	78	9 006	15 061
Camaguey	iv	89	2 333	3 222
Carlos III de España	gc	78	9 327	15 259
Carro Pelado	gc	66	9 390	13 841
Comandante C Cienfuegos	gc	63	9 735	11 888

Donato Mermol	gc	76	9 230	15 088
El Jigüe	gc	65	9 408	13 659
Frank País	gc	72	12 953	16 780
Frimaro	rf	66	1 661	2 378
González Lines	gc	77	9 732	9 735
Guisa	gc	66	9 390	13 490
Ignacio	gc	76	9 327	15 259
Agramonte	pc	76	9 327	15 259
Jesus Menéndez	pc	77	10 057	15 213
Jiguani	gc	66	9 390	13 674
Jose A Echeverría	pc	78	11 980	15 840
Jose Martí	gc	77	12 170	12 910
Juaraz	gc	77	9 656	14 763
Julio Antonio	pc	78	11 980	15 840
Melia	pc	65	9 390	13 685
La Plata	gc	79	9 154	14 854
Las Coloradas	pc	79	9 154	14 854
Las Mercedes	rf	66	1 237	1 199
Lazaro Peña	gc	77	10 057	15 213
Marfo	gc	66	9 390	13 586
Maximo Gomez	gc	78	9 006	15 060
Moncada	pc	75	9 327	15 259
O'Higgins	gc	77	9 656	14 763
Palma Mocha	pc	79	9 154	14 854
Pepito Tey	gc	61	8 786	12 701
Pino del Agua	pc	79	9 155	14 854
Playa Larga	gc	69	10 972	15 799
Presidente	gc	75	16 649	27 265
Alfende	bc	75	16 649	27 265
Ruben Martínez	pc	82	11 980	15 840
Vilena	gc	78	9 656	14 763
Sandino	gc	77	9 656	14 730
San Martín	gc	77	9 656	14 730
Uvero	gc	60	9 479	14 409
Victoria de Giron	gc	69	10 972	15 800
Vietnam	gc	57	7 552	4 910
Heroico	gc	65	9 390	13 694
13 de Marzo	gc	78	16 247	24 750
26 de Julio	gc	78	16 247	24 750
30 de Noviembre	pc	78	11 980	15 840
I Congreso del Partido	pc	76	9 328	15 259
XI Festival	pc	78	11 980	15 840
XIII Congreso	bc	75	13 692	22 623
IX Aniversario	gc	57	7 537	5 020
Total: 64 vessels, 520 496grt, 762 034dwt				

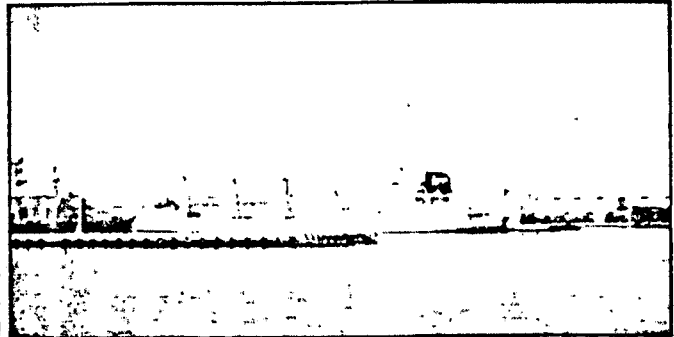
EMPRESA FLOTA CUBANA DE PESCA

Avenida La Pesquera & Alares, Muelle Osvaldo Sánchez, Havana Vieja, Havana
Tel: 61-0207, 61-6350
Telex: 51-1159 flocu cu
Cable: Flocuba
Director: Roberto Ferrer Guzmán
Operator of large fishing fleet and deepsea reefer services.
Fleet

Golfo de	rf	77	10 540	10 566
Batabano	rf	77	10 540	10 566
Golfo de Guacanayabo	rf	78	10 561	10 584
Golfo de Guanahacabibes	rf	78	10 561	10 584
Las Guasimas	et	76	3 800	5 631
Oceano Arico	rf	77	10 549	10 844
Oceano	rf	74	10 273	11 018
Atlantico	rf	69	8 795	8 510
Oceano Indico	rf	69	8 795	8 510
Pacifico	rf	69	8 652	8 510
Total: 9 vessels, 69 520grt, 70 467dwt				

SHIPREPAIRERS

EMPRESA NACIONAL DE ASTILLEROS (ENA)
Finca Tiscornia, Casablanca, Havana



Cuban fleet—steady growth over recent years

Tel: 80-2232, 62-3086
Director: Guillermo Gómez Bidot
Shiprepairer and builder of small vessels.
Facilities: Drydock (470x85ft) for vessels up to 10 000dwt, floating dock of 4 500 tons lifting capacity and two marine railways.

PUERTO PESQUERO DE LA HABANA

Havana
Tel: 9-4085
Telex: 51-1189 tabe cu
Director: Rolando Maqueira Medina
Shiprepairer of fishing vessels.
Facilities: Two floating docks of 4 500 and 2 500 tons lifting capacity.

PORTS

UNION DE EMPRESAS TERMINALES MAMBISAS—UETM

Calle 6 & 39, Nuevo Vedado, Havana
Tel: 3-8369
Telex: 51-1867 uetm cu
Director: Gumersindo González Felio
UETM is the Cuban port authority organisation. Facilities at the main ports operated by UETM subsidiaries are as follows—

Empresa Terminales Mambisas de Antilla—ETMA

Litoral del Puerto, Antilla, Holguín
Tel: 98437, 98405
Director: Ramón Pavón
ETMA is the authority for Antilla, Vita, Felton, Preston and Tanamo. Antilla is equipped with three piers for handling sugar and dry cargoes with depths alongside of up to 23ft. Preston has a pier for vessels up to 475ft and Felton a pier for ships up to 500ft. Tanamo can accommodate tankers up to 535ft or dry cargo vessels of 450ft.

Empresa Terminales Mambisas del Centro Este—ETMC

Avenida 52, No 2913, Altos, Cienfuegos
Tel: 7455, 5754
Telex: 04-2119 cu
Director: Eduardo Milanés
ETMC is the authority for Cienfuegos, Casilda, Isabela and Caibarién. Cienfuegos has two piers providing four berths used for handling general cargo, bulk sugar and petroleum products. Also a number of mooring buoys used by vessels carrying molasses, natta and petroleum.

Casilda is a sugar port with a pier which has two berths up to 560ft. Isabela has three docks for vessels up to 540ft. Caibarién is mainly a sugar port where loading is carried out at anchorage. The port has nine piers used mainly by barges carrying raw sugar.

Empresa Terminales Mambisas del Centro Este—ETMCE

Puerto Tarifa, Nuevitas
Tel: 4117
Telex: 03-1284 cu
Director: Félix García García
Authority for ports of Nuevitas, Júcaro, Manatí, Guayabal and Puerto Padre. Nuevitas has four piers for handling sugar and general cargo plus a cement dock. At Júcaro operations are undertaken at anchorages.

Manatí is a sugar loading port with one dock for vessels up to 560ft. Guayabal is a

sugar export port equipped with one pier able to accommodate vessels up to 655ft. Puerto Padre can accommodate ships up to 560ft at two docks used for handling sugar, molasses and petroleum.

Empresa Terminales Mambisas de la Habana—ETMH

San Pedro 1 & Amargura, Havana
Tel: 61-8675
Telex: 51-1133
Director: Wilfredo Henríquez Hernández
Authority for port of Havana, the capital and main port of Cuba, with some 20 docks and terminals providing facilities for all types of cargo.

Empresa Terminales del Mariel—ETM-Mariel

Avenida 61, No 12411, Mariel
Tel: 052-9510
Telex: 05719 cu
Director: Iván Este Ferrá
Authority for port of Mariel which has one pier providing three berths up to 600ft. There are also facilities for handling cement and bulk sugar.

Empresa Terminales Mambisas de Matanzas—ETM-Matanzas

Paseo de Martí, Final Versalles, Matanzas
Tel: 3804
Telex: 05-2141 cu
Director: Miguel Nerys Campos
Port authority for Matanzas and Cardenas. Matanzas has four piers for vessels up to 560ft. Main cargoes are raw sugar, molasses and fuel oil. Cardenas has one pier, 1 050ft long, offering five berths.

Empresa Terminales Mambisas del Oriente—ETMO

Avenida Jesus Menéndez 202, Santiago del Cuba
Tel: 6377/8543
Telex: 06-1183 cu
Director: Reynaldo Endis Endis
Port authority for Santiago de Cuba, Manzanillo, Niquero and Boquerón. Santiago de Cuba is a large port on the south coast. Its facilities include eight piers and docks for general and bulk cargoes including grain, cement and oil. Manzanillo is a sugar loading port where operations are mainly carried out at anchorages. Niquero has one pier with two berths for vessels up to 510ft.

DOMINICA

The largest of the Windward Island chain, Dominica lies between Guadeloupe to the north and Martinique to the south. It has an area of 290 miles² and a population of 74 000 of which some 8 400 live in the capital Roseau. The island's economy is dominated by agriculture with bananas being the main crop and export followed by limes, oranges, grapefruit and coconuts.

The main port facilities were centred on Roseau until Hurricane David in 1979. Other terminals are in operation at Woodbridge Bay, one mile north of Roseau, and Portsmouth, the second town situated on the north west coast of the island.

DOMINICAN SHIPPING GROUP
Roseau

DOMINICA continued

This group, which functions as part of the Dominican Employers Federation, has as its members, agents and lines serving the port.

DOMINICA PORT AUTHORITY

PO Box 243
Tel 4431/2 Telex: 8617
Cables: Dompport
Authority for port facilities at Roseau, Portsmouth and Woodbridge Bay. In 1983, 691 vessels called with 48 063 tons of exports and 78 800 tons of imports.
Portsmouth: 260ft pier with 11ft alongside.

Woodbridge Bay: Two wharves available with depths alongside of up to 36ft. Ro/ro vessels can be accommodated.

Roseau: This port is mainly an open roadstead, pier out of commission since being damaged by Hurricane David in 1979.

DOMINICAN REPUBLIC

The Dominican Republic is the largest of the two nations on the island of Hispaniola, occupying some two thirds of the area on the eastern side. The island itself is situated between Cuba to the west and Puerto Rico to the east. The Republic has an area of 19 300 miles² and a population of some 5.65mn of which about 1.5mn live in Santo Domingo, the capital and main port.

The economy is based on agriculture (sugar, coffee, cacao) and mining (bauxite and ferro-nickel). The main export earners are sugar, followed by ferro-nickel, coffee, gold, silver, tobacco and bauxite. Major imports include foodstuffs, textiles, machinery and vehicles.

Santo Domingo and the nearby port of Haina, handle 85% of all import traffic passing through the Republic.

The merchant fleet of the Republic has remained fairly stable through the 1980s as the table below shows.

ASSOCIATION OF SANTO DOMINGO SHIPOWNERS

Jose Contreras 108, Santo Domingo
Tel: 533-4931
Director: José Augusto Savinón

DEPARTMENT OF MERCHANT MARINE

Secretaría de Estado de Industria y Comercio, Oficinas Públicas, 7 Fl, Ave México, Santo Domingo
Tel: 685-8191
Director: Marino Cruz Durán

SHIPOWNERS ASSOCIATION OF THE DOMINICAN REPUBLIC

José Gabriel García 8, Santo Domingo
Tel: 682-1206/685-4654
President: Camilo Lluberes

SHIPOWNERS
ARMADORA NAVAL DOMINICANA

El Conde 301, Santo Domingo
Tel: 687-4009
Telex: RCA 328-4239, ITT 346-0465 rd
Operators of ro/ro services to the US.

Fleet

San Francisco	cv	78	1 190	2 063
San Jose	cv	78	1 190	2 063
San Olav	cv	78	1 190	2 063
Santa Maria	cv	78	1 190	2 063

Total: 4 vessels, 4 760grt, 8 252dwt

MARTINEZ Y COMPANIA SA

Isabel la Católica 359, Santo Domingo

Fleet development 1.1.78-85 (vessels over 1 000grt)

Year	No	Grt	No. of owners	Ave age (years)
1979	2	11 931	2	19.0
1980	8	20 759	4	11.9
1981	9	30 775	5	12.9
1982	9	25 872	5	14.1
1983	11	29 068	7	14.8
1984	11	30 464	8	17.2
1985	10	25 816	10	14.3

Source: IEMMI, Buenos Aires

Tel: 682-0497, 688-1031
Telex: ITT 346 0228 rd
Director: Rafael Vidal Martínez
Operator of general cargo services to the US.

Fleet
Rio Yaque gc 67 1 528 1 750

LINEAS MARÍTIMAS DE SANTO DOMINGO SA

José Gabriel García 8, PO Box 1148, Santo Domingo
Tel: (809) 689 9146
Telex: RCA 326 4274 lineas, ITT 346 0391 rd

Cable: Lineas
President: Camilo Lluberes
Manager: Juan T. Tavares K.
Associates: Naviera Haina SA, Naviera Macroix SA, Naviera Puerto Plata SA, Naviera Romana SA, Naviera Santiago SA
Operator of bulk carriers and general cargo vessels.

Fleet

Haina	gc	69	9 630	16 245
Macroix <td>bc</td> <td>71</td> <td>1 599</td> <td>3 020</td>	bc	71	1 599	3 020
Puerto Plata <td>gc</td> <td>71</td> <td>1 585</td> <td>3 085</td>	gc	71	1 585	3 085
Romano <td>gc</td> <td>71</td> <td>1 597</td> <td>2 847</td>	gc	71	1 597	2 847
Santiago <td>gc</td> <td>67</td> <td>5 113</td> <td>9 260</td>	gc	67	5 113	9 260

Total: 5 vessels, 19 528grt, 34 557dwt

SHIPREPAIRERS
ASTILLEROS BENITEZ

c/o Marítima Dominicana SA, PO Box 1301, José Gabriel García 8, Santo Domingo

Tel: 688-4431
Telex ITT 3460 323, RCA 4244
Vice president: Karsten H Windele
Facilities: Shiprepairer with one dry dock (419ft long) for vessels up to 6 000dwt.

PORTS
DOMINICAN REPUBLIC PORT AUTHORITY

Ave Maximo Gómez 70 & Ave México, Santo Domingo

Tel: 688-5197, 685-4094
Executive Director: Hugo Cabrera M
The state port organisation. Local control is vested in port commanders and the collector of customs.

The Republic has some 12 ports with facilities as follows.

Barañona: Sugar export port with three wharves of which two used for sugar. Berth lengths up to 688ft. Third berth has facilities for handling gypsum in bulk.

Boca Chica: Mainly a sugar export port with a 1 000ft wharf able to accommodate ships up to 460ft.

Cabo Rojo: Bulk bauxite export port
Haina: breakwaters protect this port which has a 35ft deep entrance channel. Port has total quayside of 3 800ft which includes facilities for handling bulk sugar and grain, container and ro/ro cargoes. There is a 60 tonne ro/ro ramp. In 1983 some 57 660TEUs were handled, aggregating 465 000 tons of cargo.

La Romana: Bulk sugar export port with 28ft depth alongside terminal. Also small wharf for shallow draught vessels.

Manzanillo: Banana export port equipped with one pier 740ft long and 40ft alongside.

Palenque: Operated by Refinería Dominicana de Petróleo SA. Single buoy mooring three miles from Punta Palenque with 84ft depth available.

Puerto Duarte: 560ft pier with 30ft alongside can berth two 20 000 ton vessels. Small passenger terminal available.

Puerto Plata: Depths in harbor up to 35ft. Old pier 496ft long and New pier

934ft. Ro/ro facilities available.

Puerto Viejo de Azua: 650ft long pier with 35ft alongside

San Pedro de Macoris: 2 500ft of quay offering five berths for vessels up to 10 000dwt.

Santo Domingo: Seven berths for vessels up to 600ft long. Depths alongside range from 18 to 28ft. New 820ft long passenger wharf. Two oil terminals one for tankers up to 16 000dwt. Drydock for vessels up to 6 000dwt available.

GRENADA

The most southerly of the Windward Islands, Grenada has an area of 133 miles² and is situated 90 miles north of Trinidad. The population is around 110 000 and St George's is capital. Agriculture is the mainstay of the economy with main exports being cacao, nutmeg and bananas while dry goods, wheat and rice are among major imports.

GRENADA PORT AUTHORITY

Permanent Secretary, Customs, St George's

Tel: 3588
General manager: Sydney Coard
The facilities at St George's have been expanded through a EC\$5.1mn project financed by the Caribbean Development Bank and the Grenadian International Development Agency. The development consists of a 250ft schooner berth, dredging and relocation of port buildings to provide more storage space for containers. More cargo equipment and training are also included. Two other berths are available providing 800ft of quay with a depth of 28ft. The port is experiencing a steady growth in container traffic with over 700TEUs handled in 1983 and over 900 anticipated for 1984. In 1984 some 741 vessels called at the port including 70 passenger vessels, over 400 cargo vessels and 153 schooners in which much cargo is carried mainly to Trinidad.

GADELOUPE

With the political status of a French Overseas Department, Guadeloupe consists of two islands—Grande Terre and Basse Terre—separated by a four mile strait. Guadeloupe is situated centrally in the Leeward Islands with Montserrat to the north and Dominica to the south. Along with a number of small island dependencies including St Barthelemy, Guadeloupe has a land area of 584 miles² and a population of some 325 000. The town of Basse Terre is the capital and commercial centre. Agriculture including sugar, coffee, bananas and pineapples are the mainstay of the economy.

Situated 130 miles to the southeast of Guadeloupe and part of the French West Indies, St Barthelemy is a small island in the Leeward chain. With an area 9.7 miles² and a population in excess of 3 000 the economy is predominantly based on tourism and Gustavia is the capital and main port.

PORT AUTONOME DE LA GUADELOUPE

Gare Maritime, PO Box 485, 97165 Pointe-a-Pitre Cedex
Tel: (590) 836313
Telex: 033 710 gl

Director: Jacques Sourisseau
Authority for the ports of Basse-Terre, Folle-Anse (on the nearby island of Marie Galante) and Pointe-a-Pitre.

Facilities
Basse-Terre: Two quays, 690ft long with 36ft alongside. Bananas are the main cargo handled for which special equipment is available.

Folle-Anse: Terminal for bulk sugar exports.

Pointe-a-Pitre: Split into three areas (tourist, industrial and commercial) some 15 berths are available. Four are used by cruiseships and provide a total of 2 067ft. A further four are used for general cargo, ro/ro and containers and offer over 2 000ft of quay. There are two ro/ro ramps and two 40-ton container cranes.

The other six berths form the industrial port of Pointe Jarry, sited opposite to Pointe-a-Pitre. Here there is one berth each for handling minerals, sugar, oil and grain and two for general cargo and containers. In total these provide over 2 950ft of quay. Depths throughout the port range from 25ft to 35ft.

PORT OF GUSTAVIA AUTHORITY

St Barthelemy, le 97133, FWI
Tel: 87 66 97
Facilities: Two docks provide 500ft of quay with depths alongside up to 20ft. Ro/ro vessels can be accommodated.

HAITI

Occupying the western third of the island of Hispaniola, Haiti is positioned between the Dominican Republic to the east and Cuba to the west. Its population is about 6mn people and the land area amounts to 10 700 miles². Over the past few years efforts have been made by the government to improve agricultural output and also expand the light manufacturing industry. Coffee is the main export, accounting for a third of revenues, followed by manufactured goods. Other important crops are sugar and sisal while rice and cotton growing are being developed. Tourism is also playing an increasingly important part in the economy. Main imports are foodstuffs, textiles, vehicles and construction materials. Port-au-Prince, the capital and main port, has a population of about one million.

GOVT. ORGANISATIONS & ASSOCIATIONS

DEPARTMENT OF PUBLIC WORKS TRANSPORT & COMMUNICATIONS
Palais des Ministeres, Port au Prince
Tel: 2-2164

L'ASSOCIATION DES AGENTS DE LIGNES DE NAVIGATION
Port-au-Prince
The local body of shipping agents.

PORTS
MIRAGOANE

Port Manager, Reynolds Co, Miragoane
This port is used entirely for the export of bauxite. Vessels up to 10 000dwt can be accommodated at a pier operated by Reynolds.

PORT-AU-PRINCE/CAP HAÏTEN AUTORITÉ PORTUAIRE NATIONALE-APN

PO Box 616, Port-au-Prince
Tel: (01) 25300 Telex: 2030001
Director general: George Lanecq
Captain of the port: J.A. Hodelin
Branch: Rue 17, Cap Haïten
Tel: (03) 20625
Telex: 2030303
Port manager: Maurice Dagundeau
The state port organisation, APN operates the ports of Port-au-Prince and Cap Haïten.

Facilities:
Cap Haïten: This port has been reconstructed with work being completed last year. It is now equipped with one berth, 593ft long, used by cruise ships (38ft alongside), a ro/ro and general cargo berth 847ft long and another quay, 328ft long, used by local cargo vessels.

Port-au-Prince: Main port for Haiti, has a 1 400ft container and general cargo terminal with 32ft alongside. The terminal has a 30-ton capacity Portainer crane and two ro/ro ramps. In 1983 some 35 366TEUs with 240 639 tons of cargo were handled, 16 900TEUs imports (181 850 tons) and 8 930 units (58 789 tons) exports. Ten acres of storage space is available.

A second pier is used for cargo operations providing two berths, one of 540ft and one of 1 250ft with 25-30ft of water alongside. Mooring dolphins are used to berth cruise ships of up to about 880ft long. Facilities for bulk flour and cement are available at private wharves and a number of oil companies also have their own terminals.

JAMAICA

Lying to the south of the eastern end of Cuba and north of Venezuela, Jamaica has a population in excess of two million and a land area of 4 243 miles². Kingston is the capital and major port with Montego Bay being the main tourist center and second port. Jamaica's largest economic activity is bauxite and alumina followed by tourism and agriculture, the major crops being sugar, coffee, bananas, pimento and ginger. Under the Caribbean Basin Initiative the island's government has been endeavouring to attract more foreign investment particularly from the US.

The contraction of the bauxite/alumina industry, the mainstay of the Jamaican economy accounting for two thirds of export earnings, poses a serious threat to the country's economic future. Over the past year two companies, Reynolds and Alcoa, have left Jamaica because, in the face of a world bauxite/alumina glut, they found their operations in other parts of the world more profitable. These withdrawals have left the Jamaican economy some \$60mn a year worse off.

As to the other parts of the economy the sugar crop this year was 12 000 tonnes up on 1984 at 205 900 tonnes but it was below the target of 210 000 tonnes. Tourism which is the second largest earner of foreign currency, is anticipating no more than an average year although recent years have seen a growth in this sector. Overall last year saw a 8.6% increase in exports compared to 1983 to a value of \$745.3mn while imports fell 7.6% to \$1 183.2mn as against the previous year. Exports to the Caribbean Economic Community (Caricom) slipped 37.6% while imports fell by a slightly smaller amount. In 1983 Jamaica agreed a standby credit with the International Monetary Fund of \$180mn and this was followed by a devaluation of the Jamaican dollar towards the end of that year.

In maritime terms Jamaica is a leading force in the Caribbean in that Kingston has developed into a major container port and transshipment center; it has its own national line and it is a shareholder in both the regional multinational shipping companies, West Indies Shipping Co (Wisco) and Naviera Multinacional del Caribe (Namacar) headquartered in Costa Rica. The possibility of setting up a shipbreaking facility on the island is also being investigated. This would be a \$10mn project including site preparation, the purchase of equipment and working capital.

GOVT. ORGANISATIONS & ASSOCIATIONS

MINISTRY OF PUBLIC UTILITIES & TRANSPORT
PO Box 9000, ICWI Bldg, 2 St Lucia Ave, Kingston 5
Tel: 92 68130/8

SHIPPING ASSOCIATION OF JAMAICA (SAJ)

5-7 Duke St, Kingston
Membership of the SAJ includes shipping agents, stevedores, wharf companies and those providing ancillary services. It also regulates the supply and management of stevedoring labor in Kingston, provides computer services for companies operating in the port and prepares statistics for the port authority. The Association also participates in planning the port with the port authority. The SAJ is affiliated to the Caribbean Shipping Association and serves as the Secretariat for this regional shipping body.

SHIPOWNERS

CARIBBEAN CEMENT CO LTD
Rockfort, PO Box 448, Kingston
Tel: (92) 86231/5
Tel: 2145 carbeem ja
Fleet
New
Providence Cl ce 87 2 081 3 420

COLDPORT LTD
122-124 Third St, PO Box 410, Newport West, Kingston 11
Tel: 923-8727, 6824
Telex: 7473 portcold ja
Associate: Portcold (which see)
Fleet
Hermenia gc 76 3 687 5 862

JAMAICAN MERCHANT MARINE LTD
7th Fl, Dyoall Bldg, 40-46 Knutsford Blvd PO Box 952, Kingston 5
Tel: 92-91982/6
Telex: 2295 jmm ja 2483
Chairman: Noel Hylton
Deputy chairman: Derrick Dyer
Executive director: Erwin L. Angus
General manager: Robert Bravo
Subsidiary: JMM Atlantic Line Ltd
A state shipping line joint venture with Transportación Marítima Mexicana (TMM) of Mexico which holds 25%. JMM (Atlantic) is owned jointly by JMM and Jamaica Banana Producers Steamship Co Ltd.

Services: UK-Caribbean (monthly) and N. Europe/UK-Caribbean (weekly) space charter on Streamline Service (Finncarriers, Flomerca, Johnson and Royal Main Line) Bauxite shipments to US and grain to Jamaica.

Fleet
Morant Bay ro 81 1 549 2 813
St Anns Bay cv 70 3 428 5 110
Total: 2 vessels, 4 977grt, 7 823dwt

PORTCOLD LTD
122-124 Third St, PO Box 410, Newport West, Kingston 11
Tel: 923-8727, 6824
Telex: 2473 portcold ja
Managing director: Ishmael Robertson
Associate: Coldport (which see)
Fleet
Corah Ann gc 82 2 497 4 440

SHIPREPAIRERS

BELMONT DRY DOCK LTD
Kingston
Facilities: 800 ton slipway.

BERRY'S MARINE SERVICES LTD
92 Hagley Park Rd, Kingston, 11
Tel: 933-6783, 933-6371

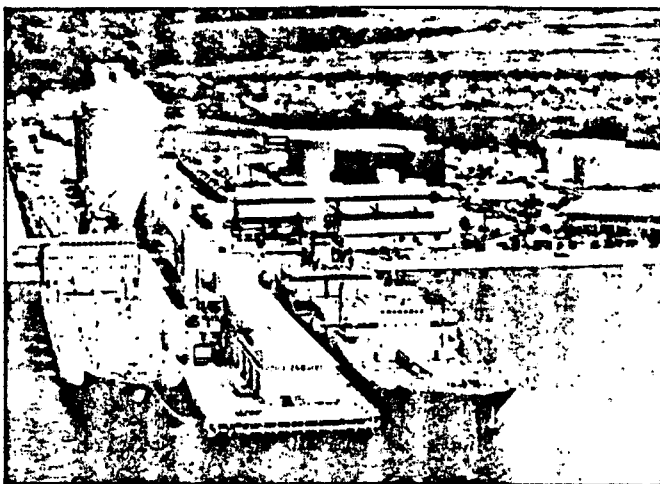
PORTS

MONTEGO WHARVES LTD
PO Box 303, Montego Bay
Tel: 5329 mo port
Operator of Montego Bay.

PORT AUTHORITY OF JAMAICA
15-17 Duke Street, Kingston
Tel: (922) 0290 8
Telex: 2478 trezone ja
Chairman: Noel Hylton
General manager: Lucie Rattray
Director of marine services: Capt. S. Willers

This body holds jurisdiction over all ports in Jamaica which are about 12 in number. Kingston: 11 public berths between 525ft and 600ft with depths alongside ranging from 22.5ft to 36.5ft. In addition there are four privately owned oil docks, a terminal for handling lumber and one for gypsum. In the public facilities, berths 1-8 are used for general cargo and ro/ro vessels with two ramps being available. These berths extend for 4 725ft and have both open and cold storage capacity adjoining. Berths 9-11 comprise a 1 800ft long container terminal equipped with four 40-ton capacity gantry cranes. There is also 45 acres of storage space for 5 000 containers. The public wharves are operated through three companies, Kingston Terminal Operators Ltd, Western Terminals Ltd and Kingston Wharves Ltd. Also 785ft cruise ship berth is available.

Of the private facilities, vessels up to 440ft are able to use the mooring dolphins at the gypsum export terminal owned by Jamaica Gypsum. Lumber is handled at a wharf owned by Wherry Wharf Ltd which is 200ft long with 29ft alongside. Among the oil terminals Texaco has a jetty for vessels up to 18 000dwt; Petrojam's pier can accommodate vessels up to 743ft and Shell has a wharf used primarily by



Jamaica's aluminum industry under pressure

Jamaica Flour Mills for handling bulk grain. Esso operate both oil terminal and dry cargo dock for vessels up to 600ft in length. Kingston has a free port near to the container terminal.

Luca: Used mainly for bananas and molasses, this port has one main wharf 270ft long with 35ft alongside. Also wharves for lighters.

Montego Bay: Three berths are operated by Montego Wharves Ltd offering 1 575ft with depths up to 34ft. Two berths have ro/ro facilities. Most frequent callers are cruise ships and banana vessels.

Ochos Rios: Pier for cruise ships can handle vessels up to 850ft with 40ft alongside. There is also a wharf used for bulk sugar and bauxite exports which is 1 500ft long with 42ft alongside.

Port Antonio: Principally a banana export terminal. Wharf with 35ft depth alongside.

Port Esquivel: Vessels of 320ft can berth at a wharf used mainly by Alumina Jamaica Ltd for export of bulk alumina. Wharf offers two berths with second one used for general cargo.

Port Kaiser: 655ft pier used for export of alumina with 36ft alongside. Fuel and grain are also imported.

Port Rhoades: Bauxite/alumina export port operated by Kaiser Bauxite. Vessels up to 704ft can be accommodated.

Rio Bueno: Grain import terminal operated by Caribbean Milling. Main jetty has 23ft alongside. Other smaller piers.

Rocky Point: Alumina/bauxite export point with pier for vessels up to 680ft.

Savanna La Mar: Sugar export port where loading undertaken by barge. Wharf for loading barges with 8ft alongside.

MARTINIQUE

Positioned in the Windward chain between Dominica to the north and St Lucia to the south, Martinique, like Guadeloupe, has the political status of a French Overseas Department. Its capital and main port, Fort de France, has about one third of the total population of 350 000. Agriculture (sugar, pineapples and bananas), tourism and a growing industrial sector are the main parts of the economy.

PORTS

FORT DE FRANCE
Service d'exploitation du port, PO Box 615, Bassin de Radoub, Fort de France
Tel: 702073/714074
Harbor master: A. Gibon
Port authority for Fort de France.

Facilities: Public wharves with 2 300ft of quay with 36ft alongside. Private wharves (the Chamber of Commerce and CGM) provide an extra 1 300ft with 26ft depth alongside. One ro/ro ramp is available. Bulk carriers and tankers up to 100 000dwt can be accommodated. A

new container terminal with 820ft of quay and two 40 tonne gantry cranes is planned.

Total traffic handled in 1982 amounted 1 830 339 tons with imports accounting for 1 263 030 and exports 590 852 tons.

SHIPREPAIRERS

SOCIETE INDUSTRIELLE DE GESTION DU BASSIN DE RADOUB-SIGBR
Fort de France
Tel: 726940 Telex: 912451 mr
Facilities: One dry dock of 656ft long able to accommodate vessel of 20 000 tons.

MONTSERRAT

Agriculture and tourism make the major contributions to the economy of this small island situated to the southwest of Antigua in the Leeward chain. Plymouth, the capital, has about 10% of the 12 000 or so population and the island has an area of 39 miles². Vegetables and sea island cotton are the main exports.

MONTSERRAT PORT AUTHORITY

PO Box 383, Plymouth
Tel: 2791/2
Port manager: I. Barrington Browne
The port of Plymouth combines an open roadstead with a jetty providing two berths.

NETHERLAND ANTILLES

The Netherlands Antilles is the collective name for two small groupings of islands in the Caribbean. The largest and most important islands (Curaçao, Aruba and Bonaire) are situated off the coast of Venezuela while the others (St Maarten, St Eustatius and Saba) are in the Leeward chain. The total area of these islands is 394.1 miles² and the population is 260 000. Their political status is as an autonomous federation within the Netherlands although recently Aruba has been pushing for independence. Aruba has a population of 67 000. The island faces economic difficulties following the closure last March of the Exxon refinery which accounted for over 50% of the island's income. Exxon claimed the 400 000b/d refinery was unprofitable and lost \$50mn last year. The closure of the refinery has led the Netherlands Government to provide a \$32mn loan to Aruba to cover the budget deficit. A similar problem has arisen on neighbouring Curaçao with the large Royal Dutch/Shell Group refinery but here Venezuela's state oil company, Petroleos de Venezuela SA, has taken control of the facility.

Oil dominates the economy of the Netherlands Antilles and these major changes have inevitably caused much uncertainty. Apart from oil, tourism and manufacturing comprise the economy. The quality of soil prevents any large scale agriculture development. Tourism

Netherlands Antilles continued

is the largest employer and the second biggest revenue earner and its performance fluctuates having shown some decline in recent years but its significance will grow as a result of the changes in the oil industry. The southern Antilles are strongly linked to Venezuela while those islands in the Leewards are much more influenced by US visitors. Curaçao is an important offshore financial center with some 25 000 companies registered. Income from these companies represented some 20% of total government revenues in 1982. The islands are a beneficiary of the Caribbean Basin Initiative so encouraging new investment in areas outside oil.

Maritime affairs are linked very strongly to the oil industry with the islands having several deepwater tanker terminals and transshipment facilities. The Antilles also serves as an open registry flag with particular advantages for Netherlands based owners. According to Lloyd's Register some 50 ships over 499grt are registered totalling 494 411grt and 658 292dwt.

GOVT. ORGANISATIONS & ASSOCIATIONS

MINISTRY OF TRANSPORTATION & COMMUNICATION
Fort Amsterdam 17, Curaçao
Tel 613988 Telex 1079

SHIPREPAIRERS

CURACAO DRYDOCK CO INC (CDM)
Dokweg 1 PO Box 3012 Koningsplein
Willemstad, Curaçao
Tel (549 9) 78333
Telex 1107, 1207, 3307, 3443 cdm na
Managing director: Ir. M.R. Evertsz
Production manager: G. Bob Schnel
Facilities: Two dry docks (918 x 157ft and 633 x 87ft) for vessels up to 155 000 and 28 000dwt respectively and 6 000ft of repair wharves. Agents for most diesel engine manufacturers as well as other machinery and equipment items.

JOSEPH ODUBER SHIP REPAIR CONTRACTOR
PO Box 367, San Nicolas
Tel 5566 6066
Shiprepairer for most jobs except drydocking

SMALL CRAFT YARD ANTILLES INC
Willemstad
Tel: 23320

PORTS

BONAIRE
Kralendijk
Harbor master: P. Bevenos
Tel: 833945

The port has three piers— northern 225ft with 34ft alongside for vessels up to 650ft, the southern is 294ft long with 45ft for the largest cruise ships, and the ro/ro pier suitable for vessels up to 300ft long and 20ft draught.

Salina
Pier for vessels up to 40 000dwt with 45ft alongside. The port is owned by the Antilles International Salt Co and used for bulk salt export shipments.

Brazil
Bonaire Petroleum Corporation NV
BOPEC Bldg, PO Box 117, Bonaire
Tel: 8175 Telex: 1283 bopec na
Managing director: Th. G.M. Tjissen
Terminal manager: W.H.J. de Ridder
Oil transshipment port operated by Bonaire Petroleum Corp. Two piers provide berths for tankers up to 550 000dwt with 110ft alongside.

CURACAO
Bullen Bay
Curaçao Oil Terminal NV PO Box 660,
Curaçao
Tel: 1175/79 cot na
From December 1, 1985 ownership of Curaçao Oil Terminal will be transferred to PDVSA, the Venezuelan state oil company, as part of the disposal of Shell's facilities in Curaçao.

Facilities: Six 'T' head jetties with dolphins offering berths ranging from 860ft to 1 350ft for vessels between 70 000dwt and 530 000dwt. Depths up to 100ft alongside available.

Caracas Bay
Port operated by Shell Curaçao Ltd although the harbor master at Willemstad has jurisdiction here. Facilities include two piers for vessels up to 1 050ft long and 46ft draught can be accommodated. Port mainly used by tankers and cruise ships.

Fulka Bay
Curaçao Mining Co. Newport
Port for loading phosphatic rock in bulk. Dock can handle vessels up to 360ft long.

St Michiels Bay
Single buoy mooring for vessels up to 350 000dwt. Jetty for barges.

Willemstad
Dienst Haven EnnLoodswezen, Harbor Office, Werf de Wilde, Oostraa No 1a, Willemstad

Tel: 611133/12239
Cable: Harbor office
Harbor master: E.P. Sint Jago
Facilities: The port is situated around a 4 200ft channel leading into a large bay (Schottegat) of 150 acres. Depths in channel range from 50 to 79ft and in Schottegat from 10 to 79ft. Maximum size of vessel is 850ft. Ten wharves and terminals provide over 8 000ft of berthage for general cargo vessels with depths alongside of between 19 and 36ft. Shell Curaçao, in addition, operates 12 piers and wharves for tankers and general cargo vessels with depths up to 45ft. Four vessels can also berth at dolphins.

A container terminal providing three 1 000ft berths with 34ft alongside and two ro/ro berths are being developed. In 1983 27 562 TEUs were handled.

Curaçao Port Services Inc,
PO Box 170, Curaçao
Tel: 615177
Telex: 1053
General manager: C. Koper
Operators of general cargo and container facilities at Willemstad.

ARUBA
Aruba Ports Authority NV
Port Administration Bldg, L.G. Smith Blvd, Oranjestad
Tel: 26633

Telex: 5120 hafa na
Acting managing director: A. Genser
Harbor master: Captain J. Sint
Facilities:

Barcadera: 1 160ft dock within harbor basin with 36ft alongside.
Oranjestad: 5 160ft of berthage available of which 4 070 is suitable for deepsea vessels. Depths alongside vary from six to 36ft. Two ro/ro ramps available. Container terminal with 820ft berth with 38ft alongside for deepsea vessels and two smaller berths for feederships. Terminal served by 50 ton gantry crane. In 1983, 22 672 TEUs handled with 110 744 tons of cargo.

San Nicolas
Operated by Lago Oil & Transport Co and the facilities are linked to the closed Exxon refinery. There are four piers, a sulphur berth and two reef berths. The latter are for tankers up to 120 000dwt and 500 000dwt respectively. The

sulphur berth is for vessels up to 600ft with 31ft alongside. The piers offer seven berths for ships up to 900ft.

ST MAARTEN
Philipsburg is the port for St Maarten island. Small pier available.

PUERTO RICO

Known as a commonwealth territory of the US, Puerto Rico is positioned between Hispaniola to the west and the Virgin Islands to the east. Its population is 3.9mn with San Juan the capital, also being the major port. The economy is very much centered on trading, brought about in part by the preferential treatment goods manufactured in Puerto Rico receive in the US market. This sector contributes some 40% of the island's gdp and has been the underpin of the significant growth experienced. Puerto Rico has the highest per capita income of any Caribbean island. Recession has hit the island, however, in recent years.

The main industries are oil refining, pharmaceuticals, chemicals and electronics. All the oil is imported but only 60% is consumed locally, the remainder being reshipped to the US. The petrochemical industry has been hard hit by recession bringing about some sales and rationalisation of facilities. Tourism and agriculture also contribute to the economy and the latter is being investigated so that a long term development plan can be compiled.

The island is well served with ports and there is a state shipping line Navieras de Puerto Rico which carries much of the traffic to and from the US.

GOVT. ORGANISATIONS & ASSOCIATIONS

PUERTO RICO SHIPPING ASSOCIATION
San Juan
Association of shipping agents and lines serving Puerto Rico affiliated to the Caribbean Shipping Association.

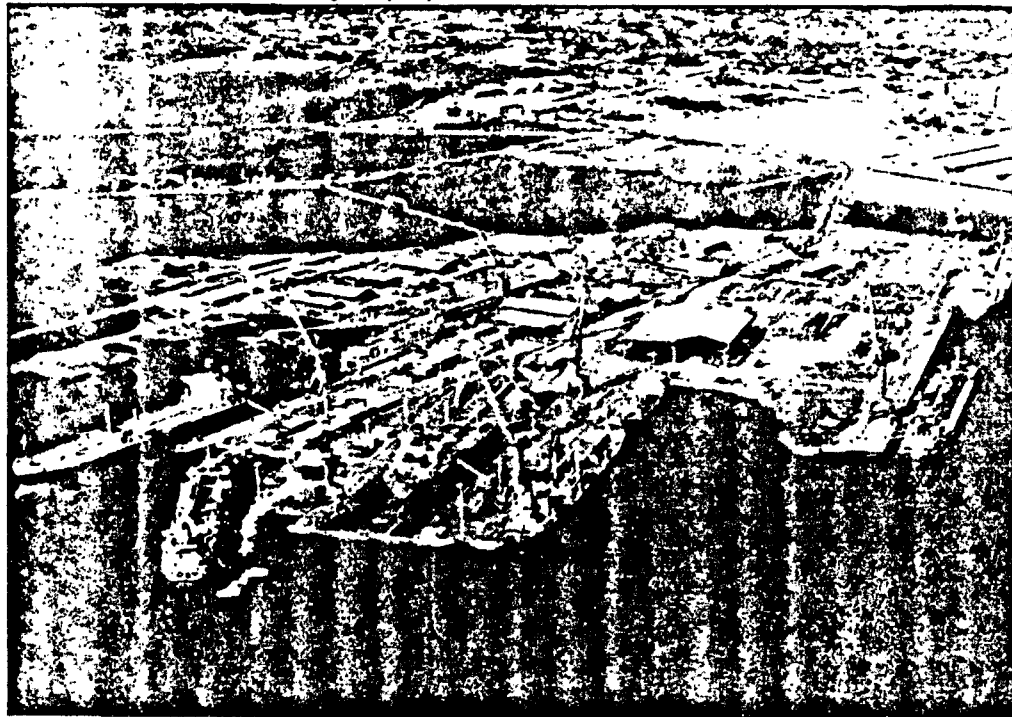
SHIPOWNERS

NAVIERAS DE PUERTO RICO
(Puerto Rico Maritime Shipping Authority) GPO Box 71105, San Juan PR 00936
Tel (809) 754-6565
Telex: 3859777
Cable: Navieras

Executive director: Esteban Davila Diaz
Navieras de Puerto Rico was reorganised in March when the government-owned line turned over the daily operations of the company to Puerto Rico Marine Management (PRMMI), a subsidiary of TNT Containerships, the parent organisation of Trans Freight Lines. Navieras provides regular connections at San Juan with links to mainland ports plus southbound links to the Dominican Republic, Haiti, Trinidad & Tobago, US Virgin Islands and Leeward & Windward Islands. The north bound trade includes carriage of finished products whilst the southbound trade to the Caribbean carries a range of commodities including raw materials foodstuffs, automobiles, heavy lorries and construction equipment. In August of this year Navieras added the Atlantic Spirit, which is on a six month bareboat charter from Acadian Shipping Corp (see Apex Manne, US Shipowners section), to the Elizabeth—San Juan route, increasing Navieras northwest ro/ro capacity by 60%.

Fleet			
Arecibo	cv 44/69	17 977	16 215
Bayamon	ro 71	15 131	14 407
Borinquen	gc 45/66	17 189	16 759
Caguas	ro 74	17 513	16 337
Fortaleza	ro 72	15 135	13 745
Ponce	ro 68	15 134	14 268
Puerto Rico	ro 75	14 770	14 316
San Juan	cv 44/69	18 455	17 610
Total: 8 vessels, 131 204grt, 123 657dwt			
*owned by 650 Leasing Co			
*owned by 666 Leasing Co			
*owned by United States Trust Co of New York			
*owned by Sun Leasing Co			
*owned by 670 Leasing Co			

Curaçao Drydock—the Caribbean's largest repair yard



Puerto Rico continued

SHIPREPAIRERS

PUERTO CALDERA

Puerto Caldera

A new shiprepair yard being developed and due to start operation in June 1986. It is costing \$13mn and it will include a 1 600 ton lifting capacity floating dock able to accommodate ships up to 2 300dwt.

PUERTO RICO DRYDOCK & MARINE TERMINALS INC

PO Box 2209, San Juan, PR 00903

Tel: (809) 723-6010, 721-0769

Telex: 345-0031 (ITT)

CEO: Gonzalo Garcia Chamon

Facilities/services: Shiprepairer, also undertaking minor conversion with graving dock 691 X 100ft, capacity 30 000grt; floating dock 200ft, 1 000 tons lift capacity; nine berths up to 300ft. Steel floating dock of 1 000 tons lifting capacity. 18 000ft berthing piers total.

SAN JUAN SHIPYARD

San Juan

Tel: 725-2255-752-2282

VAELL SHIPYARD

1 Barbosa Street, Catano

PORTS

COMMONWEALTH OF PUERTO RICO PORTS AUTHORITY (CPRPA)

PO Box 2829, San Juan, PR 00936-2829

Tel: (809) 723-2260

Telex: 9464 aut: dpr

Executive Director: Guillermo F. Valls

Shipping provides the lifeblood of Puerto Rico's developing industrial base, and this island of three million people generates commercial shipments of some \$17bn per annum. Of the island's three principal ports, San Juan, Mayaguez and Ponce, San Juan is by far the largest and most diversified, accounting for about two-thirds of Puerto Rico's total estimated cargo throughput averaging 6.4mn tons a year. Expansion of San Juan's container facilities from 200 acres to 365 acres is high priority among the Authority's present undertakings. Accommodation for cruise ships is also being improved.

The CPRPA is authority for most port facilities on the island which is served by some 11 terminals.

Aguadilla: Mooring buoys for handling vessels with oil, sugar and molasses cargoes.

Arecibo: 600ft pier with 18ft alongside used for handling liquid chemical cargoes

Fajardo: 250ft long pier used for inter-island ferries and cargo vessels to Vieques and Culebra.

Guanica: Bulk grain, sugar, animal feed and fertilizer cargoes loaded at 700ft long pier with 28ft alongside.

Guayanilla: Two public wharves 680ft long each. Also private facilities operated by Union Carbide for chemical shipments, Pittsburgh Plate Glass which has its own pier, and Commonwealth Oil Refining own two tanker berths.

Jacos: 633ft wharf for receiving oil shipments.

Las Mareas: Port for fuel oil and liquid chemical imports. Facilities include finger pier with two berths of 1 119ft each plus two mooring dolphins.

Mayaguez: 1 200ft wharf for handling cargo vessels. Also piers for harbor craft and tuna packing plants.

Ponce: Municipal pier 514ft and main wharf 2 200ft long for cargo vessels and rt/ro's.

San Juan: Some 12 piers for handling a wide range of facilities for handling general cargo vessels as well as ferries, cruise ships and tug/barge units.

Also Isla Grande terminal and Puerto Nuevo docks for general cargo and ro/ro vessels. Container terminal is 1 320ft long and Trailer Marine Transport operates two facilities for ro/ro barge and tug/barge units. Over 20 other berths for general cargo, ro/ro and breakbulk cargoes. Also terminals for explosives,

bulk grain and oil (3 berths). Major ship repair facilities available.

Yabucoa: Facilities for deep draught tankers and tug/barge units. Also dock owned by Union Carbide.

ST KITTS-NEVIS

The twin state of St Kitts-Nevis is part of the Leeward chain located at the northern end of the Eastern Caribbean. St Kitts has an area of 65 miles² and a population of about 35 000 while Nevis is 36 miles² in area and has a population in excess of 9 000. Basseterre is the capital and main port. Nevis lies two miles south of St Kitts and the ferry route from Basseterre to Charlestown is 11 miles long. The economy is dominated by agriculture, in particular sugar, although sea island cotton is being developed for export to Japan and tourism and light industry are being encouraged.

MINISTRY OF COMMUNICATIONS, WORKS & PUBLIC UTILITIES

Government Headquarters, PO Box

186, Basseterre, St Kitts

Tel: 521

Telex: 820 extm bskb kc

SHIPPING ASSOCIATION OF ST KITTS

Basseterre

The Shipping Association represents the various maritime interests on the island. It is affiliated to the Caribbean Shipping Association.

ST KITTS & NEVIS PORT AUTHORITY

Harbor Office, Basseterre

Tel: 4109

General manager: Carl Brazier

This body is the authority for the deep water pier at Basseterre and the port of Charlestown on the island of Nevis.

Facilities: Basseterre consists of the 400ft long deep water pier which handles conventional cargo and ro/ro vessels. By use of a dolphin berth it can accommodate ships up to 500ft. Depth alongside is 30ft. There are also piers for handling timber and passenger vessels and two owned by the St Kitts Sugar Factory used for loading bulk sugar and molasses into barges.

At Charlestown the port has a 386ft pier.

ST LUCIA

Lying between Martinique to the north and St Vincent to the south, St Lucia is the second largest island in the Windwards with an area of 238 miles². Castries is the capital and main port and accounts for some 50 000 of the island's total population of about 120 000. While tourism and industry are of increasing importance to the economy it remains dominated by agriculture with bananas, cacao and coconuts as the main crops.

MINISTRY OF COMMUNICATION & WORKS

Public Works Bldg, Michael St, Castries

Tel: 2611

ST LUCIA SHIPPING GROUP

Castries

Body representing the various shipping interests on the island and affiliated to the Caribbean Shipping Associations.

ST LUCIA AIR & SEA PORTS AUTHORITY

PO Box 651, Castries

Tel: 22641, 22666, 23364 & 22894

Telex: 6355 pestuc

Chairman: George Girard

General manager: Davius Charlemagne

Branch Office: Vieux Fort, Tel: 46611

Authority for the ports of Castries and Vieux Fort and serves as the port and airport division of the Ministry of Communications & Works.

Facilities: At Castries six berths between 360 and 520ft are available with depths ranging from 18 to 35ft alongside. Berth 5 has a ro/ro ramp 48ft wide. Development work includes the provision of two berths for cruise vessels and covered and open storage areas. Tanker facilities are sited at Coconut Bay on the south side of the



Swan Hunter's Trinidad yard

harbor owned by Texaco. A 535ft long pier offers two berths at Vieux Fort with 26ft alongside.

CUL DE SAC—

Hess Oil St Lucia Ltd

Cul de Sac

Tel: 3105 & 3904

Telex: 3416346 hess st lc

Hess Oil operates a terminal at Cul de Sac with two berths, for tankers up to 400 000dwt and 50 000dwt respectively.

ST VINCENT

This 133 mile² island and the Grenadines form part of the Windward chain lying between Grenada to the south and St Lucia to the north. Some 115 000 of the 123 000 total population live on St Vincent whose capital is Kingstown, also the main port. Agriculture, tourism and light industry comprise the economy with the main crops being bananas, arrowroot, coconuts, sugar and cacao.

MINISTRY OF COMMUNICATIONS, WORKS & LABOR

Kingstown, St Vincent

Tel: 1389/1962

KINGSTOWN PORT AUTHORITY

Hazells Ltd, PO Box 108, Kingstown, St Vincent

Tel: 61311/9

Telex: 7512 hazells vq

Port manager: M. Bennett

Facilities: 900ft pier provides two berths, depth alongside 27ft. Geest Industries vessels get priority.

TRINIDAD & TOBAGO

Trinidad is the southernmost of the eastern Caribbean islands and it lies just seven miles off Venezuela. Tobago is situated 19 miles to the northeast of Trinidad and has a land area of 116 miles². Trinidad has an area of 1 864 miles² and the population of the two combined is 1 060 000. Port of Spain is the capital and main port on Trinidad and Scarborough similarly on Tobago.

Petroleum, asphalt, agriculture and tourism comprise the economy which is in transition due to the decline over recent years of oil revenues. In 1975 oil accounted for 41% of gdp but by 1983 this had fallen to 23.8%. In oil taxes which provided 70% of the government's direct revenues in 1980 had slipped to 46% last year. Refinery output of the past seven years has more than halved.

As a result of this major change the government has been trying to encourage both agriculture and industry. Sugar exports made a recovery in 1983 from a low in 1982 of 51 000 tons and the 1985 crop of 81 250 tons was 25% up on 1984. Coffee and cocoa exports are both in decline while citrus fruit cargoes are showing signs of improving. Manufacturing too has been in decline over the past year or so.

In maritime terms Trinidad has been expanding its infrastructure in this sector especially at the industrial port of Point Lisas. It also has its own national line, Shipping Corporation of Trinidad & Tobago (Scott), which operates two chemical tankers and the West Indies Shipping Corporation, one of the two

Caribbean multinational shipping lines, is headquartered in Port of Spain.

GOVT. ORGANISATIONS & ASSOCIATIONS

MINISTRY OF PUBLIC UTILITIES & NATIONAL TRANSPORTATION

5th Floor, 16-18 Sackville St, Port of

Spain

Tel: 6257001

SHIPPING ASSOCIATION OF TRINIDAD & TOBAGO

Port of Spain

President: Colin Edgehill

Organization with some 30 members including shipping lines, port authorities, shipping agents and brokers. Affiliated to the Caribbean Shipping Association.

SHIPOWNERS

SHIPPING CORP OF TRINIDAD & TOBAGO—SCOTT

Ansa House, Queen & Henry St, Port of

Spain

Tel: 62-34507/62-35295/6

Telex: 22385/22590

General manager: A. Lawlor

State shipping line operates chemical tankers and offers cargo services through slot charter arrangements.

Services: US East Coast-Caribbean: New York, Charleston, Miami and Port of Spain (fortnightly). N. Europe/UK-Caribbean (twice weekly).

Fleet:

Harold le Borde ct 84 8 823 14 326

Trinidad & Tobago ct 84 8 823 14 326

Total: 2 vessels, 17 846grt, 28 652dwt

TRINIDAD AND TOBAGO GOVERNMENT

c/o Harbor Masters Division, Wrightson

Rd, Port of Spain

Operates ferry services between Trinidad and Tobago.

Fleet:

Wind

Paradise ty 60 1 268 708

Scarlet tble ty 60 1 268 708

Tobago ro 70 1 500 709

Total: 3 vessels, 4 036grt, 2 125dwt

WEST INDIES SHIPPING CORP—WISCO

48-50 Sackville St, Port of Spain

Tel: 62-53353, 53631, 528091, 34177

Telex: 22422 wisco

Chairman: Ina Nicolson

General manager: Sherman Thomas

Wisco is a multinational shipping company owned by Trinidad & Tobago (40%), Jamaica (30%), Barbados (10%), Guyana (10%), Grenada (1.68%), St Lucia (1.5%), Antigua (1.38%) and St Kitts (1.22%). Wisco is a Caribbean Community (Caricom) institution.

Services: Miami-Port of Spain and Miami, Kingston, Antigua, Barbados, St Vincent, Grenada, and Port of Spain, with other ports on inducement, weekly. Trinidad-Jamaica, every 10 days and two inter-island services to Port of Spain, St George's, Kingston, Plymouth, Georgetown, Basseterre monthly and to Port of Spain, Bridgetown, Castries, Roseau, and St John's fortnightly.

Fleet:

Caricom Express pc 76 1 699 3 566

Caricom Venture pc 76 1 699 3 566

Total: 2 vessels, 3 198grt, 7 132dwt

Trinidad continued

PORT AUTHORITY OF TRINIDAD & TOBAGO

Port of Spain
 Facilities: Slipways of 1 100 and 500ft capacity.

SWAN HUNTER (TRINIDAD) LTD
 PO Box 893, Chaguaramas Dockyard, Port Chaguaramas
 Tel: 5239114
 Telex: 278
 Cable: Swantr, Port of Spain
 Ship repair and builder of small vessels.
 Facilities: 475ft long floating dock able to accommodate vessels up to 11 380dwt. Also 150ft Synchrolift with capacity of 750 tons, 1 600ft repair jetties.

PORTS

CHAGUARAMAS
 Chaguaramas Terminals Ltd
 This port is used for the export of bauxite and manganese ore. The main wharf offers two berths totalling 800ft with 35ft alongside. A second wharf has a length of 400ft and a depth of 15ft. Chaguaramas is the site of a repair yard operated by Swan Hunter (see ship-repairers). At Cronstadt Island there is a bulk barytes terminal which can take ships up to 430ft.

POINT FORTIN
 Trinidad & Tobago Oil Co.—Trintoc, Administrative Bldg, Point Fortin
 Telex: 37371 ttocpf wg
 The Point Fortin oil terminal operated by Trintoc, with two parallel long jet T head providing two outer berths of 600ft and an inner berth of 300ft. Also berth one mile to west for larger tankers with a depth of 45ft.

POINT LISAS
 Point Lisas Industrial Port Development Corp Ltd—PLIP, EECO, Plipdeco House, PO Box 191, Goodrich Bay Rd, Couva
 Tel: 636 2231, 2701 7
 Cable: Plipdeco, couva
 CEO: Ken Enaggs
 Authority for the marine facilities at the 2 000 acre Point Lisas Industrial Zone which includes a steel-works owned by the Iron & Steel Corporation of Trinidad & Tobago (Iscott), and a fertilizer plant operated by Fertilisers of Trinidad & Tobago Ltd (Fertin). The Iscott terminal has a 1 271ft berth with 42ft alongside and can accommodate ships up to 45 000dwt. Savonetta pier 1 serves as the Fertin terminal used for loading anhydrous ammonia, methanol and urea and is 1 050ft long with 38ft alongside. It can accommodate ships up to 30 000dwt. Savonetta No 2 pier is 300ft long with 19ft depth. There are also construction wharfs for Iscott and Fertin of 250ft and 200ft long respectively and for ro/ro vessels. Further development of facilities at Point Lisas is planned.

POINTE-A-PIERRE—BRIGHTON
 Texaco Trinidad Inc, Marine & Harbors Division, Pointe-a-Pierre
 Tel: 6584220
 Telex: 32366 tt wg
 The Refining Division of Texaco Trinidad Inc is the operator of Pointe-a-Pierre oil terminal which has eight berths for vessels up to 800ft in length and depths alongside range from 20ft to 39ft, one berth for dry cargo vessels, four for tankers and three for coastal vessels and small tankers. Also offshore single point mooring for tankers up to 250 000dwt.

Along with the Trinidad Lake Asphalt Co, Texaco also operates the port of Brighton. Two piers available one, 2 550ft long, is for loading asphalt on the eastern side and tankers on the western side. Depth alongside 29ft. The second pier has two tanker berths. At Sobo one mile north there is a single buoy mooring for large tankers.

PORT GALEOTA
 Amoco Trinidad Oil Co, Guayaguayare 3/1, Point Galeota
 Telex: 35378 amoco wg
 Operates single buoy mooring for tankers up to 250 000dwt. Depth available 95ft.

PORT OF SPAIN—SCARBOROUGH
 Port Authority of Trinidad & Tobago, General manager's office, PO Box 549, Port of Spain
 Tel: (62) 53858/62-32901
 Telex: 3477 patt wg
 Cable: Gateway, Port of Spain
 Acting general manager: F. Gillette
 Harbor master: Comm G. Arnold
 Authority for the Port of Spain, King's Wharf and its extension provide 5 100ft divided into eight berths for eight deepsea vessels and three coasters. An 1 100ft container terminal served by two Paccoco cranes can accommodate two ships. Queen's Wharf caters for schooners and inter-island cargo vessels.
 On Tobago the port of Scarborough has a 495ft wharf for coastal vessels.

TEMLADORA
 Alcoa Steamship Co Inc, Carenage, Tembladora
 Telex: 21221 alcoa wg
 Operator of bauxite transhipment terminal at Tembladora. Deepwater pier has two berths 975 and 675ft long respectively. Depths alongside 35ft.

TURKS & CAICOS

Numbering some 30 islands of which eight are inhabited, the Turks and Caicos lie between the Bahamas to the west and the Dominican Republic to the south. Almost half the population of over 7 000 live on the Grand Turk, the main island of which Cockburn Town is the capital. Fishing and tourism are the main economic activities. Apart from Cockburn Town port facilities also exist at Salt Cay, Providenciales, North Caicos and South Caicos.

GOVT. ORGANISATIONS & ASSOCIATIONS

REGISTRAR OF BRITISH SHIPS
 Government Administration Bldg, Grand Turk
 Tel: 2300/9 Telex: 8227 chiefm tq
 Registrar of ships: John Robinson
 The merchant fleet over 100grt number 14 ships of 3 882grt.

PORTS

GRAND TURK PORT AUTHORITY
 Turks and Caicos Government, Grand Turk Island
 Collector of customs: John Robinson

Assistant collector of customs: Derek Taylor
 Authority for port of Cockburn Town, capital and main port of the Turks & Caicos Islands
 Facilities: Open anchorage. One US government owned pier and two jetties for small vessels. Depth alongside pier 13ft.

PROVIDENCIALES PORT AUTHORITY
 Turks and Caicos Government, District Commissioner, Providenciales, Caicos Islands
 Tel: 4258
 Assistant collector of customs: Bernard Goodman
 New wharf completed in 1984 for cargo vessels. Financed by CDB loan of \$1.22mn. Small pier available for shallow draught vessels.

VIRGIN ISLANDS

The Virgin Islands lie between Puerto Rico to the west and the Leewards to the south east. They fall into two territorial groups, the British Virgin Islands (BVI) which number about 60 and those belonging to the US which have two main islands, St Croix and St Thomas. In the British group, Tortola is the biggest island and Road Town is the capital and main port. The population of the BVIs is 15 000 and tourism is the most important part of the economy. The population of the US islands is around 145 000 with the main towns being Christiansted and Frederiksted on St Croix and Charlotte Amalie on St Thomas. As with the BVIs, tourism is the major economic activity although there is an oil refiner, operated by Hess and an alumina plant.

PORTS

BRITISH VIRGIN ISLANDS PORT AUTHORITY
 PO Box 4, Road Town, Tortola
 Tel: 43435
 Ports manager: G. Creque
 Authority for port of Road Harbor also known as Port Purcell.
 Facilities: 800ft long pier with 24ft alongside.

VIRGIN ISLANDS PORT AUTHORITY
 PO Box 1707, St Thomas
 Tel: 809-774-1629, 809-774-3140
 Executive director: John E. Harding
 This is the authority for facilities at Crown Bay, Red Hook on St Thomas, Cruz Bay on St John and Christiansted, Frederiksted and Third Port on St Croix.

Crown Bay: Major port development underway in phases. Phase 1 nearly completed will provide berths for one 70 000grt and one 30 000grt cruise ship. Phase 11-A involves the dredging of a turning basin and deep water channel, reclamation and a 650ft wharf for cargo vessels. Phase 11-B includes the construction of 750ft berth for cruise ships and a 100 yacht marina.

Red Hook: Dock for small passenger vessel and two ro/ro ramps for cargo operations. Plans are under consideration to expand existing port facilities.

Cruz Bay: 150ft passenger dock for small ferry vessels, 400ft cargo dock and a ro/ro terminal for barges. It is intended to develop new facilities for small cargo vessels.

Christiansted: 26mn container terminal opened in 1983 can accommodate vessels up to 600ft long and has a L shaped pier 1 200ft long equipped with a 30 ton gantry crane. Consultants are also looking at the construction of a cruise ship terminal costing \$16mn able to berth two vessels of 30ft draft.

Frederiksted: Cruise ship pier for vessels up to 700ft.

Third Port: Containerport is first phase of a major development. Total length of dock is 1 970ft long of which 1 000ft is given currently to the container terminal equipped with a 30 ton gantry crane. Ro/ro ramp also available. Depth alongside 30ft.

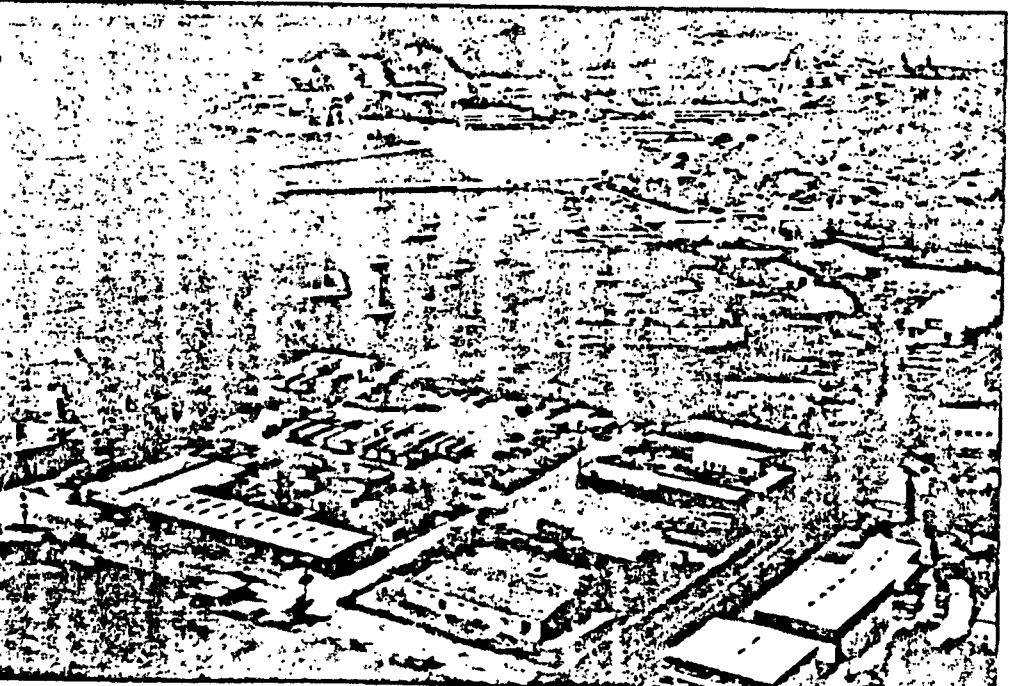
HESS OIL VIRGIN ISLANDS CORP
 PO Box 27, King's Hill, St Croix
 Tel: 773 1101
 Telex: WU 36764337, ITT 3473013
 Marine manager: John H. Frederick
 Operator of the oil terminal in Limetree Bay on St Croix which adjoins the Third Port container facility. Two T piers provide nine berths of between 500ft and 1 200ft for vessels up to 300 000dwt.

MARTIN MARIETTA ALUMINA INC
 Port captain: Richard Shirosky
 Operator of the Port Alumina bauxite export terminal in Limetree Bay situated about one mile to the west of the Hess oil terminal. The Bauxite pier is 450ft long and there is also another pier for handling alumina.

SHIP REPAIRERS

CREQUE MARINE RAILWAY
 St Thomas
 Facilities: 1 000 ton slipway.

Crown Bay's facilities are being expanded for cruise ships and cargo vessels



INDEX OF CARIBBEAN CARGO CAPACITY (CONTAINERISED)

(Source - Containerization Yearbook 1987)

Caribbean

Bahamas

FREEPORT

Freeport Harbour Co Ltd
PO Box F-2465
Freeport, Grand Bahama Island
Tel: (352) 9651 Telex: 30079
Contact: Capt John Hinchliffe, Port Director
Berths and cranes: Basin 1: two ro-ro ramps. Basin 2: two ro-ro ramps, accommodating five vessels.
Services: Tropical Shipping, Universal Alco.
Terminal facilities: Mobile cranes available for hire; front-handlers 6 Hyster (2-7t x 2, 4-5t, 6-8t, 10-4t x 2).
Consolidation: No CFS on terminal.
Computer systems: None.

FREEPORT (total)			
	1984	1985	1986 (Jan-Apr)
Import			
Loaded TEU	10 893	11 065	3 886
Empty TEU	30	76	22
Tonnage	110 102	103 323	35 969
Export			
Loaded TEU	10 893	1 386	456
Empty TEU	5 788	5 947	2 087
Tonnage	14 140	10 618	2 892
Total TEU	27 604	18 474	6 451
Total tonnage	124 242	113 941	38 861

short tons exclude tare weight

NASSAU

Port Department
PO Box N-1417
Nassau 809-32
Tel: (32) 22832, 22049 Telex: 20263
Contact: Leon H. Flowers, Port Controller
Terminal operating company:
Container Terminals Ltd
PO Box N-6183
Nassau
Tel: (32) 24537, 21012 Telex: 174
Contact: Richard Farrington, General Manager
Berths and cranes: John Alfred Wharf: three 70m berths, minimum depth 4.9m, served by two Vicon Manitowoc 175t cranes (rigged for 50t) and one American Hoist crane.
Services: Sea-Land, Tropical Shipping, USLines SA.
Terminal facilities: John Alfred Wharf: total area 8,100m²; storage 300TEU; reefer points nil; front-handlers 1 Taylor 800 (27t), 1 Taylor 650 (27t); yard tractors 1 Capacity; yard chassis 10 Fruehauf (20ft skeletal).
Consolidation: John Alfred Wharf: CFS adjacent. Covered area 3,700m²; storage on terminal; reefer points nil; forklifts 10 Hyster (2-3t).
Hours of working: Monday to Friday 0900-1300, 1400-1700.

NASSAU (total)			
	1984	1985 (estimate)	1986 (estimate)
Import			
Loaded TEU	17 370	17 870	—
Empty TEU	0	0	—
Tonnage	163 600	168 000	—
Export			
Loaded TEU	100	110	—
Empty TEU	17 270	17 760	—
Tonnage	2 000	2 200	—
Total TEU	34 740	35 740	—
Total tonnage	165 600	170 200	—

short tons exclude tare weight

Barbados

BRIDGETOWN

Barbados Port Authority
University Row
Bridgetown
Tel: 436-6883 Telex: 2367
Contact: Peter B. Parker, General Manager
Berths and cranes: Total berthage 702m, including a 215m container berth, depth 9-8m, equipped with a Manitowoc 4100W crane for container handling. In addition there is 805m of protective breakwater and 156m of shallow draught berthage.
Services: Arvida, Bernuth, Calypso, Carol, CBL, Columbus, Concorde/Nopal, Geest, Ivaran, Japan Line/MOL, K-Line, MBC, Nedlloyd, Saguenay, TEC, TMT, Tropical Shipping, Wisco.
Terminal facilities: Total area 6ha (stacking 2-5ha); storage 1,384TEU; reefer points 18 electric; mobile cranes 1 Coles (26t); straddle carriers 2 Ferranti VC830L (35t), 2 Valmet 40107 (40t); front-handlers 1 Hyster (14t), 1 Lancer Boss (15t); side-loaders 2 Lancer Boss 2500CH (25t); yard tractors 6 Reliance-Mercury; yard chassis 5 Mafi (20ft flatbed).
Consolidation: CFS on terminal. Total area 3ha; covered area 5,314m²; storage on terminal; reefer points on terminal; forklifts 8 TCM (3t).
Computer systems: Hardware Burroughs B1965; software in-house: functions container delivery/receipt, including container stuffing/stripping.
Hours of working: Mon-Fri 0700-1600, 1600-1900, 1900-2300; Sat 0700-1600, but to 2300 to free a ship.
Future plans: Addition of a container gantry crane.

BRIDGETOWN (total)			
	1984	1985	1986 (estimate)
Import			
Loaded TEU	12 390	13 173	13 900
Empty TEU	1 525	1 557	1 600
Tonnage	247 800	263 460	278 000
Export			
Loaded TEU	3 663	3 367	3 100
Empty TEU	10 095	12 755	13 000
Tonnage	73 260	67 340	62 000
Total TEU	27 673	30 852	31 600
Total tonnage	321 060	330 800	340 000

tonnes include tare weight

Dominican Republic

Autoridad Portuaria Dominicana
Av Maximo Gomez 70
Apartado Postal 259-2
Santo Domingo
Tel: 688-5184
Contact: Hugo Cabrera Martinez, Executive Director

HAINA

Terminal operating company:
Sea-Land Service Inc
Av A Lincoln 1061
PO Box 1431, Santo Domingo
Tel: 532-2591/7 Telex: 0302
Contact: A. Rodriguez, Country Manager
Berths and cranes: One berth, length 200m equipped with one 27-5t Paccco Portainer and one 140t mobile crane.
Services: Sea-Land.
Terminal facilities: Storage 1,000TEU.
Hours of working: Seven days a week.
Container handling statistics: 1984, 67,536TEU.

PUERTO ANDRES (BOCA CHICA)

Berths and cranes: Terminal quay length 300m, depth 8m, equipped with one 165t crawler crane, and a ro-ro ramp.
East Quay (Naves & Terminales SA): ro-ro container terminal, leased by TMT.
Services: Carol, PRMSA, TMT.
Terminal facilities: Storage 1,800TEU (three-high); straddle carriers various.
Future plans: Enlargement and improvement of the port, to include a container crane.
Container handling statistics: 1984, 27,240TEU.

SANTO DOMINGO

Berths and cranes: General cargo berths for self-sustaining container vessels.
Services: Prudential
Terminal facilities: Equipment provided by shipping lines.
Container handling statistics: 1984, 10,056TEU.

Guadeloupe

POINTE-A-PITRE

Port Autonome de la Guadeloupe
Gare Maritime, BP 485
97165 Pointe-a-Pitre
Tel: 916313 Telex: 91971
Contact: Christian Georgelin, Operation Managing Director
Berths and cranes: Berth 14: length 240m, depth 11m, served by two 40t ACB-Paccoco Portainers.
Ro-ro berths also available.
Services: CGM, CGM/Interline, CR, Marseille Fret, Mixte, MOL, Nedlloyd, Surinam, TFC Line, Wisco.
Terminal facilities: Total area 25ha; storage 3,000TEU; reefer points 48 electric, 2 ConAir; front-handlers 12 various (4t-40t); yard tractors 8-Mafi.
Consolidation: CFS on terminal. Total area 20ha; covered area 3,000m²; storage on terminal; reefer points on terminal; forklifts as terminal.
Computer systems: Hardware Honeywell Bull DPS6/450.
Hours of working: Container Terminal: 24 hours a day.
Future plans: Extension of Portainer rail tracks. Foreign Trade Zone of 9-5ha to be operational in late-1988 and integrated into 36ha commercial and industrial area.

POINTE-A-PITRE (total)

	1984	1985	1986 (estimate)
Import			
Loaded TEU	41 912	35 400	39 500
Empty TEU	365	267	100
Tonnage	442 999	447 143	440 250
Export			
Loaded TEU	17 248	19 876	21 500
Empty TEU	14 000	19 327	15 100
Tonnage	301 517	316 141	332 800
Total TEU	73 525	74 870	76 200
Total tonnage	744 516	763 284	773 050

tonnes include tare weight

Haiti

PORT-AU-PRINCE

Autorite Portuaire Nationale
PO Box 616
Port-au-Prince
Tel: (1) 20224 Telex: 25300
Contact: Jean F. Policard, General Director

Berths and crane: Wharf length 427m. with additional 550m available, served by one Washington 30t container gantry crane. Two ro-ro berths.

Services: Sea-Land, Norwegian Caribbean Line, Deutsche Karibic, Nedlloyd, CGM, Carol, Concorde/Nopal, Saguenay, Kirk, Zim.

Terminal facilities: Total area 4ha; storage 1,800TEU (two-high); reefer points 60 electric; mobile cranes 1 P&H crawler (120t); straddle carriers 1 Drott 770TC Travelift (30t); front-handlers 1 Clark (40t), 1 Hyster (20t); yard tractors 10 Inter/Mack; yard chassis 20 various (40ft flatbed).

Consolidation: CFS on terminal. Total area 8ha; covered area 1.1ha (5,620m² × 2); forklifts 5 Clark (7.5t, 3.5t × 4), 11 Clark/Hyster (2.5t).

Computer systems: None.

Hours of working: 24 hours a day (0700-1300, 1300-1900, 1900-0100, 0100-0700).

KINGSTON (total)			
	1984	1985	1986 (estimate)
Import			
Loaded TEU	53 664	78 136	84 854
Empty TEU	17 711	33 392	36 734
Tonnage	670 747	1 071 297	1 378 586
Export			
Loaded TEU	39 611	65 405	79 435
Empty TEU	31 689	45 738	34 387
Tonnage	475 236	900 048	1 177 562
Total TEU	142 675	222 671	235 410
Total tonnage	1 145 983	1 971 345	2 556 148
freight tonnes exclude tare weight			

Hours of working: Monday to Friday, 0800-1200, 1300-1600; Saturday 0800-1130; Sundays, double time.

PLYMOUTH (total)			
	1984	1985	1986 (estimate)
Import			
Loaded TEU	340	378	415
Empty TEU	0	0	0
Tonnage	7 900	8 800	9 900
Export			
Loaded TEU	0	0	0
Empty TEU	375	420	460
Tonnage	0	0	0
Total TEU	715	798	875
Total tonnage	7 900	8 800	9 900
short tons exclude tare weight			

Leeward Islands

Antigua

ST JOHN'S

Deep Water Harbour

PO Box 1052

St John's

Tel: 20050/1/3 Telex: 2179

Contact: E. Sweeney, Port Director

Berths and crane: One berth of 366m, depth 11m, served by four mobile cranes (35t, 50t, 140t, 200t).

Services: Bernuth, Concorde/Nopal, Japan Line/MOL, Nedlloyd, NYK, RMC, Saguenay, TEC, Tropical Shipping, Wisco.

Terminal facilities: Total area 3ha; storage 410TEU; reefer points 7 electric; truck-cranes 1 P&H (140t), 1 Coles 91258APC (10t); front-handlers 2 Clark (40t, 30t); yard tractors 2 American-Coleman Champion 4064BC51; yard chassis 6 BWS (40ft skeletal × 2, 20ft skeletal × 4).

Consolidation: CFS on terminal. Covered area 3,721m²; storage on terminal; reefer points on terminal; forklifts 3 Datsun (2t × 2, 3t), 6 Clark (3t).

Computer systems: None.

Hours of working: Mon-Fri 0700-1200, 1300-1600.

ST JOHN'S (total)			
	1984	1985	1986 (estimate)
Import			
Loaded TEU	3 803	3 990	4 150
Empty TEU	0	0	0
Tonnage	57 384	69 111	72 000
Export			
Loaded TEU	514	414	520
Empty TEU	2 786	3 442	4 000
Tonnage	7 864	6 229	8 000
Total TEU	7 103	7 848	8 670
Total tonnage	65 248	75 340	80 000
revenue tonnes exclude tare weight			

Montserrat

PLYMOUTH

Montserrat Port Authority

PO Box 383

Plymouth

Tel: 2791, 2971

Contact: John E. Wilson, Port Manager

Berths and crane: Berth 1: quay length 108.5m, depth 8.5m.

Berth 2: quay length 55m, depth 6m. Containers are handled using ships' own gear.

Services: Bernuth, Concorde/Nopal, Harrison, TEC, Wisco.

Terminal facilities: Total area 5,574m² (container parking 2,322m²); storage 150TEU; reefer points nil; truck-cranes 1 Coles Husky 635 (36.3t); front-handlers 1 Clark C500 (25t), 2 Coventry Climax TC6 (2.4t), 1 Coventry Climax TCA (1.8t); yard tractors 1 Levy-Russell Yard Brute, 2 Reliance-Mercury; yard chassis 2 Dorsey (40ft flatbed, 20ft flatbed).

Consolidation: CFS on terminal. Total area 1,858m²; covered area 930m²; reefer points nil.

Netherlands Antilles

ARUBA

Ports of Aruba

Aruba Ports Authority NV

Port Administration Bldg

LG Smith Blvd 23

Oranjestad

Tel: (8) 21373, 26633 Telex: 5120

Contact: Milton H. Henriquez, Managing Director

Container Terminal

Terminal operating company:

Aruba Stevedoring Co (ASTECC) NV

Haventerrein

Oranjestad

Tel: (8) 22558 Telex: 5069

Contact: M. J. Schoon, Managing Director

Berths and crane: Quay length 450m, depth alongside 12m. A Nelcon 50t container gantry crane services the berths. In total there is 1,490m of dock length available to accommodate ocean-going vessels. Two ro-ro berths are available. A 150t P&H mobile crane is also available to unload container vessels.

Services: Carol, Elma, Genesis, Japan Line/MOL, King Ocean, Sea-Land, SMS.

Terminal facilities: Total area 13ha; storage 7,500TEU; reefer points 36 electric; front-handlers 1 Hyster (35t), 1 RayGo Wagner (35t), 1 Yale (10t); yard tractors 4 Ibex, 2 Sisu TV10AXT; yard chassis 8 Buiscar (40ft skeletal), 8 RTS (roll-trailers).

Consolidation: CFS adjacent to terminal. Total area 5,000m²; covered area 2,000m²; storage 100TEU; reefer points nil; forklifts 5 Komatsu (2.5t × 4, 3.5t), 4 Toyota (2.5t).

Computer systems: None.

Hours of working: 0800-2400. Overtime available.

ARUBA (total)			
	1984	1985	1986 (estimate)
Import			
Loaded TEU	8 900	8 203	8 000
Empty TEU	35	549	500
Tonnage	89 347	87 520	85 000
Export			
Loaded TEU	1 037	8 752	8 500
Empty TEU	7 624		
Tonnage	4 848	5 000	5 000
Total TEU	17 596	17 504	17 000
Total tonnage	84 193	92 520	90 000
tonnes exclude tare weight			

WILLEMSTAD

Curacao Port Services Inc

PO Box 170

Curacao

Tel: (9) 615177 Fax: (9) 616536

Telex: 1053

Contact: K. J. O. Aster, General Manager

PORT-AU-PRINCE (total)

	1984	1985	1986 (estimate)
Import			
Loaded TEU	18 069	19 441	19 880
Empty TEU	540	665	710
Tonnage	158 924	161 002	163 540
Export			
Loaded TEU	8 874	9 056	10 832
Empty TEU	9 533	11 132	9 758
Tonnage	55 330	53 584	56 205
Total TEU	37 016	40 294	41 180
Total tonnage	214 254	214 586	219 745
tonnes include tare weight			

Jamaica

KINGSTON

Port Authority of Jamaica

15-17 Duke St

Kingston

Tel: 922-0290/8 Telex: 2386

Contact: L. M. Rattray, General Manager

Container Terminal

Terminal operating company:

Kingston Terminal Operators Ltd

PO Box 132, Newport West

Kingston 15

Tel: 923-5141/5 Telex: 2378

Contact: Capt Michael J. Belcher, Managing Director

Berths and crane: Four container berths, length 183m each, depth 10.4m-12.2m, served by two 40t Paccco-Vickers and two Dominion Bridge-Paccco container gantry cranes.

Services: Atlantik Xpress, Carol, CCT, Columbus, Evergreen, Sea-Land, Streamline, Zim.

Terminal facilities: Total area 18.2ha; storage 5,400TEU; reefer points 72 electric, 64 ConAir; straddle carriers 1 Rubery Owen (30t), 2 Ferranti K90 (30t), 3 Valmet (30t); front-handlers 1 Kalmar (30t); yard tractors 14 Ottawa, 2 White, 1 Mack; yard chassis 24 Strick (40ft skeletal), 26 Reliance-Mercury (40ft flatbed).

Consolidation: CFS on terminal. Covered area 1ha; forklifts 31 various (3.5t, 2.3t × 30).

Computer systems: Hardware IBM 5280, IBM 38; software IBM/in-house; functions container tracking.

Rail facilities: Reservation provided. To be installed at a future date.

Hours of working: 0700-1400, 1400-2100, 2100-0500, seven days a week.

Future plans: 40ha area available for expansion in the short/long term. Additional deepwater frontage for long-term expansion, to include ro-ro facilities.

Caribbean: Netherlands Antilles/Puerto Rico/Trinidad/Virgin Islands/Windward Islands

Berths and cranes: Three berths, each 305m length, maximum depth 10.2m. Container berth 500m length, maximum depth 12.2m, with one Nelcon 50t container gantry. Two ro-ro berths, maximum depth 10.2m. Two ro-ro berths maximum depth 12.2m.

Services: Bank, Carol, CCT, Columbus, Evergreen, King Ocean, Nedlloyd, Sea-Land, SMS.

Terminal facilities: Total area 16ha; storage 1,700TEU; reefer points 86 electric; front-handlers 1 Hyster (10t), 1 RayGo Wagner (40t), 3 Silent Hoist (25t, 35t, 50t); yard tractors 3 Flexi, 8 Ottawa, 1 White; yard chassis 8 Buiscar (40ft).

Consolidation: CFS on terminal. Covered area 2,787m²; storage on terminal; reefer points on terminal; forklifts 8 Komatsu (2.5t-3.5t), 10 Toyota (2.5t-3.5t).

Computer systems: None.

Hours of working: 0700-1500, 1500-2300, 2300-0700.

WILLEMSTAD (total)			
	1984	1985	1986 (estimate)
Import			
Loaded units	10 895	10 046	9 500
Empty units	617	761	750
Tonnage	187 470	172 664	160 000
Export			
Loaded units	2 689	2 836	3 000
Empty units	8 615	7 893	7 400
Tonnage	64 004	66 210	57 200
Total units	22 516	21 536	20 650
Total tonnage	251 474	238 874	217 200
35/40t units: 54% 1984, 46% 1985, 55% 1986 tonnes exclude tare weight			

Puerto Rico

PONCE

Puerto Rico Ports Authority

PO Box 2829
San Juan, PR 00936
Tel: 842-2145

Contact: William S. Williams, Port Captain

Berths and cranes: Municipal quay of 157m length, and wharves of 576m and 138m length, depth 9.5m, served by one heavy-lift crane. Ro-ro ramp available.

Services: Carol, PRMSA, TMT.

SAN JUAN

Puerto Rico Ports Authority

PO Box 2829
San Juan, PR 00936
Tel: 723-2260 Telex: 9464

Contact: Jose R. Garcia, Chief, Maritime Bureau

Berths and cranes: Isla Grande: PRMSA terminal has berths of 212m and 202m, minimum depth 9.1m, served by two 45t container gantry cranes. Isla Grande also provides ro-ro facilities for TMT. Puerto Nuevo: berths C, D, E, F, G, H, J, K, M, each 183m length and Berth L 274m length. Minimum water depth 9.1m. Berths E and F are used by Sea-Land, equipped with two

SAN JUAN (total)			
	1984	1985	1986 (estimate)
Import			
Loaded*	230 768	440 815	0
Empty*			
Tonnage	8 809 823	3 871 311	
Export			
Loaded*	230 768	176 328	
Empty*			
Tonnage	1 210 072	1 334 807	
Total	461 536	617 143	
Total tonnage	5 019 896	5 206 118	
*1984 figures in units, 1985 in TEU 35/40t units: 89% 1984 short tons exclude tare weight			

Paceco cranes, G and H by PRMSA. The latter are served by five Paceco 27.5t container cranes.

Services: Sea-Land, PRMSA, Caribe Lines, CGM, Carol, TMT.

Terminal facilities: Isla Grande: trailer parking 16.7ha (PRMSA), 12.1ha (TMT).

Puerto Nuevo: trailer parking available.

Consolidation: Isla Grande: covered area 3,000m² (PRMSA).

Puerto Nuevo: covered area 9,500m² (Berths A & B), 9,300m² (Berth D).

Trinidad

PORT OF SPAIN

Port Authority of Trinidad & Tobago

1 Ajax St, PO Box 549
Port of Spain
Tel: 623-5719/5879, 625-4074 Telex: 22477
Contact: Keith Anatol, General Manager

Berths and cranes: Berths 6 & 6A: two container berths, total length 542m, depth 10m, served by two Paceco 40t Portainers.

Services: Sea-Land, Saguenay, Tropical, EuroCaribe, Harrison, Booth Shipping, Wisco, Columbus, Carol.

Terminal facilities: Berths 6 & 6A: total area 6.9ha (plus 155 chassis slots); reefer points 96 electric; yard gantries 2 rubber-tyred Diamond 458A (40t), 2 rubber-tyred Ferranti 458B (40t); mobile cranes 1 Mannesman Demag MC600 (100t), 1 Link-Belt HC125A (200t), 2 Link-Belt HC138A (75t), 3 Link-Belt UC1088 (50t), 4 Link-Belt UC78 (30t); straddle carriers 3 Clark (40t); front-handlers 3 Hyster 6208 (28t), 2 Hyster 2508 (23t), 7 Hyster 250H (11-1t), 1 Clark C500Y130 (6t), 9 Clark C500Y355 (2t), 30 Hyster HC60 (3t), 36 Toyota 02-2FG (3t), 52 Datsun PFG02 (3t); yard chassis 28 Aztec (40ft x 16, 20ft x 12), 40 Fruehauf (20ft), 43 Mafi (40ft x 10, 20ft x 33), 7 Merriworth (40ft), 12 Pigg (40ft).

Consolidation: Berths 6 & 6A: CFS adjacent to terminal (sheds 9 and 10). Covered area 1.5ha; forklifts 16 Toyota 3F825 (2.5t).

Computer systems: Hardware IBM system 34; software Infotech; functions container/trailer tracking and billing.

Hours of working: 0700-1600, overtime 1600-1900.

Future plans: Berth 7, length 198m, to be upgraded to container berth with container handling cranes.

Two rubber-tyred Kone FELS-Ferranti (35t) yard gantries on order.

PORT OF SPAIN (total)			
	1984	1985	1986 (estimate)
Import			
Loaded units	34 241	37 818	32 582
Empty units	630	248	1 077
Tonnage	544 842	752 613	371 456
Export			
Loaded units	2 848	2 935	4 737
Empty units	33 811	37 281	32 436
Tonnage	41 220	54 769	54 669
Total units	71 428	78 362	70 842
Total tonnage	586 062	807 382	426 125
35/40t units: 39% 1984, 37% 1985 long tons exclude tare weight			

Virgin Islands

St Croix

LIMETREE BAY

Virgin Islands Port Authority

Marine Office, PO Box 1134
Christiansted, St Croix, VI 00820
Tel: 778-3131
Contact: Floyd Knight, Marine Manager

Berths and cranes: 305m pier served by one 30t Paceco Portainer. Ro-ro facility with two ramps. Depth 9.7m.

Services: PRMSA, TMT, Tropical Shipping.

Terminal facilities: Total area 23ha; storage 864TEU.

Consolidation: Covered area 2,787m².

Hours of working: 24 hours a day (if required).

Future plans: Provision of consolidation facilities; expansion of the port in an area of 16ha to the west of the port.

LIMETREE BAY (total)			
	1984	1985	1986 (estimate)
Import			
Loaded TEU	8 854	9 500	—
Empty TEU	8 789	8 800	—
Export			
Loaded TEU	7 854	8 300	—
Empty TEU	2 806	3 200	—
Total TEU	28 303	29 800	—

Windward Islands

Dominica

ROSEAU

Dominica Port Authority

PO Box 243
Roseau
Tel: 4431/3 Telex: 8617

Contact: Olwyn M. Norris, General Manager

Berths and cranes: Main Dock: 152m general purpose berth, minimum depth 10.9m. No container cranes.

Services: Bernuth, CGM, Geest, Nedlloyd, RMC, Saguenay, TMT, Wisco.

Terminal facilities: Total area 1.8ha (stacking 1,858m²); front-handlers 1 Clark (24t); yard tractors 1; yard chassis 4 various (20ft).

Hours of working: 0800-1300, 1400-1600; overtime 1600-2400.

Future plans: Preparation of a 7,400m² container park with road connection.

ROSEAU (total)			
	1984	1985	1986 (estimate)
Import			
Loaded TEU	662	739	800
Empty TEU	103	477	420
Tonnage	11 098	14 612	15 200
Export			
Loaded TEU	172	263	300
Empty TEU	472	757	650
Tonnage	3 511	5 121	5 850
Total TEU	1 409	2 236	2 170
Total tonnage	14 609	19 733	21 050
tonnes exclude tare weight			

Martinique

FORT-DE-FRANCE

Bassin de Radoub

PO Box 615
Fort-de-France
Tel: 712023

Contact: Mr Gehl, Harbour Master

Berths and cranes: Public berths totalling 800m, maximum depth 10.5m, served by a 50t crane. CGM has a private berth of 400m length, depth 8m. A ro-ro berth is also operational.

Services: CGM, Mixte.

Hours of working: 0700-1100, 1300-1600.

Future plans: A new terminal is planned, with the containership berthage to be extended by 250m. A deepwater berth is to be constructed to receive containerships of 240m length, draught 12m. Two 40t gantry cranes are planned.

**St Lucia
PORT CASTRIES**

St Lucia Air & Sea Ports Authority
PO Box 651
Castries

Tel: 22641, 22893/4 Telex: 6355

Contact: George C. Girard, General Manager

Berths and cranes: Three berths, for vessels 158m-244m, depth 12m, served by one 140t P&H truck-crane, and one Manitowoc 4100W mobile crane.

Services: AFS, Alpha, Bernuth, CGM, Geest, Nedlloyd, Saguenay, Samba, TEC, TMT, Tropical Shipping, Wisco.

Terminal facilities: Storage 600TEU (two-high); reefer points 13 electric; front-handlers 2 Lansing Henley Hermes (30t), 1 Lansing Henley Hercules (8t), 1 Lancer Boss (35t); yard tractors 3 Sisu; yard chassis 11 PlanMarine (20ft flatbed), 24 RTS (40ft flatbed x 4, 20ft flatbed x 20).

Consolidation: CFS on terminal. Total area 2.8ha.

Hours of working: 0700-1600 Monday to Friday. Overtime available.

PORT CASTRIES (total)

	1984	1985	1986
<i>Import</i>			(estimate)
Loaded TEU	3 123	3 282	3 350
Empty TEU	371	342	600
Tonnage	47 906	54 000	59 000
<i>Export</i>			
Loaded TEU	720	447	750
Empty TEU	2 632	3 079	3 180
Tonnage	11 713	8 000	13 000
Total TEU	6 846	7 150	7 880
Total tonnage	59 619	62 000	72 000

freight tonnes exclude tare weight