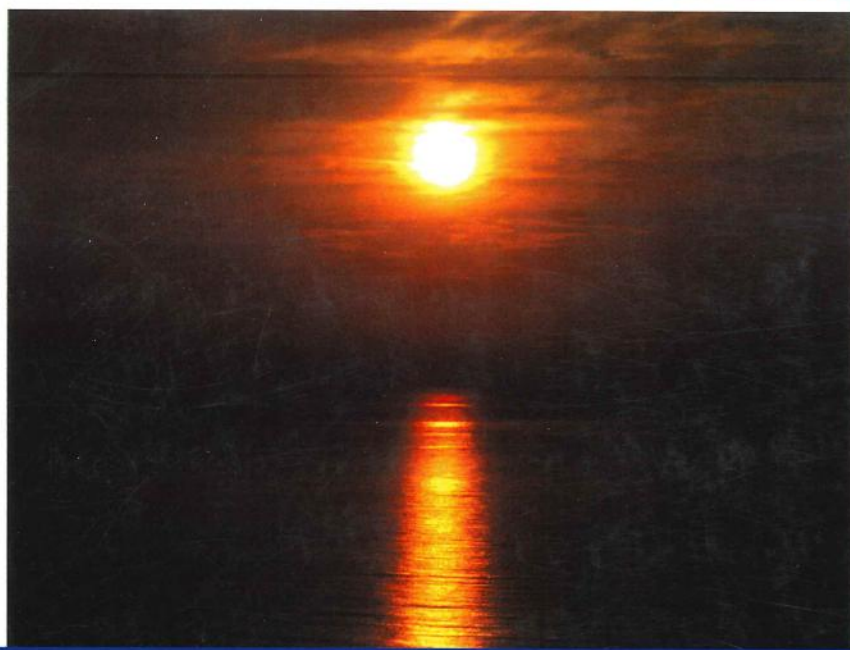




67th Annual General Meeting



the shipping association of jamaica

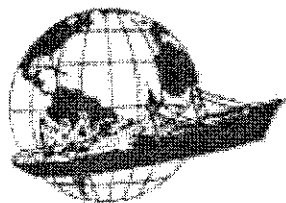
**Friday, December 2, 2005
Shipping Association of Jamaica Conference Room**

"As an Association, we also have to decide how we will face the next 66 years. How do we anticipate the changes in the shipping industry and provide the appropriate support and representation for our membership, our industry, our workers and our staff..?"

Harry Maragh, President, 2002-2005

Friday, December 2, 2005

Jamaica, West Indies



ANNUAL GENERAL MEETING 2005

Shipping Association of Jamaica

THE SHIPPING ASSOCIATION OF JAMAICA

AGENDA 67th ANNUAL GENERAL MEETING FRIDAY, DECEMBER 2, 2005

at 10:00 a.m.

Shipping Association of Jamaica's Conference Room
4 Fourth Avenue, Newport West

- ITEM 1 CALL TO ORDER
- ITEM 2 APOLOGIES
- ITEM 3 (a) CONFIRMATION OF MINUTES
 - 66th Annual General Meeting held on
 Friday, December 3, 2005
 (b) Matters Arising
- ITEM 5 (a) PRESIDENT'S REPORT FOR 2005
 (b) Matters Arising
- ITEM 6 PRESENTATION OF FINANCIAL STATEMENTS
 - (I) The Shipping Association of Jamaica
 - (A) Approval of Audited Financial Statements to
Year End 31 December 2004
 - (B) Unaudited Financial Statements for period
January to September 2005
 - (II) Port Computer Services Limited
Audited Financial Statements to Year End
31 December 2004
 - (III) Shipping Association of Jamaica Property Limited
Audited Financial Statements to Year End
31 December 2004
- ITEM 7 ELECTION OF:
 - (A) President for 2006
 - (B) Vice President for 2006
 - (C) Managing Committee Members for 2006
- ITEM 8 APPOINTMENT OF AUDITORS
- ITEM 9 ANY OTHER BUSINESS

THE SHIPPING ASSOCIATION OF JAMAICA

**MINUTES OF THE 66th ANNUAL GENERAL MEETING
HELD ON FRIDAY, DECEMBER 3, 2004 AT 10:00 A.M. AT THE SHIPPING ASSOCIATION OF JAMAICA,
4 FOURTH AVENUE, NEWPORT WEST**

In attendance:

NAME	COMPANY	VOTING STATUS
H Maragh, President	Lannaman & Morris Shpg	Voting
	Lannaman & Morris (S&M) Ltd	Voting
	Metro Shipping	Voting
	Metro Investments	Voting
M Bernard, Vice President	Shipping Services (Stevedoring) Ltd	Voting
	Jamaica Freight & Shpg Co Ltd	Voting
	Coastal Shipping	Voting
	Interseas Limited	Voting
	Ship Management Services	Voting
G Stephenson, IPP	Kingston Wharves Limited	Voting
	Kingston Terminal Operators Ltd	Voting
	Western Terminals	Voting
	Jamaica Fruit & Shipping	Voting
C Johnston	Jamaica Producers Shipping	Voting
	Producers Shipping Co	Voting
	Jamaica Producers Shipping	Voting
	Maritime & Transport Services	Voting
K Clarke	A E Parnell & Company Ltd	Voting
	Maritime Towing Co Ltd	Voting
	Seaport Equipment	Voting
	Xars Equipment & Trucking	Voting
R Gibson	Newport Warehousing (1974) Ltd	Voting
J Worton	Transocean Shipping Ltd	Voting
R Hinds	Grace Kennedy Logistics	Voting
D Martin	Port Contractors Limited	Voting
P Pinnock	Metro Investments	Voting
F Pinnock	Seafreight Jamaica Limited	Voting
J Lowe	Maritime & Transport Services Ltd	Observer
A Rochester	R S Gamble (1998) Ltd	Voting
	Arnold Malabre & Company	Voting
	Port Cold	Voting
C Robertson-Sylvester	Cold Port	Voting
	Carib Star	Voting
E Johnson	Royale Ocean Shipping	Non-voting
R Lorde	TS Crane Service	Voting
J Ralston	Port Services Ltd	Voting
A Wood	SGS	Non-voting
B Brown	Ja Container Repairs Service	Non-voting
R Williams	Freight handlers Ltd	Voting
D Lyn Fatt	Grace Kennedy Shpg co Ltd	Voting
L Tulloch	International Shipping	Voting
W Rhoden	Oceanair International Ltd	Voting
S Bell	LSK & Company	Non-voting
C Johnston	Jamaica Freight & Shpg	Observer

T Riley	Shipping Association of Jamaica	General Manager
E Chin	"	Financial Controller
H Baker	"	HRD Manager
S Lowrie	"	Comm & Serv Manager
G Donaldson	-do -	Admin. Officer
R Lewis	Port Computer Services Ltd	General Manager
F Yeo	Assessment Recoveries Limited	General Manager
D Gordon	Shipping Association of Jamaica	Rec.Secretary

ITEM 1 **CALL TO ORDER**

The President called the meeting to order welcomed all to the 66th Annual General Meeting of the Shipping Association of Jamaica. He said that he had expected to see more members attending, but acknowledged those who took time out to attend the meeting. He also acknowledged the presence of the CSA President, Mrs Corah Ann Robertson-Sylvester.

The President also extended a special welcome to Mr Sydney Lowrie who joined the Association as Communications & Services Manager. He took the opportunity to thank Mrs Margaret Mais who had acted in the position from October 2003.

ITEM 2 **APOLOGIES FOR ABSENCE**

Apologies were tendered on behalf of Messrs Robert Kinlocke and Fabian Stewart who were unable to attend the meeting and Mr Alva Wood who would be late.

ITEM 3 (a) AMENDMENTS/CONFIRMATION OF MINUTES

Page 2, under caption "Amendments to the Constitution" fourth line: "meeting" should be "meet"

There being no further amendments, the Minutes of the 65th Annual General Meeting which was held on December, 2003 were confirmed on a motion by Mr. Ruel Gibson, seconded by Mrs. Paula Pinnock and unanimously carried.

Following the confirmation of the minutes, Mrs Lynfatt enquired about the reason why some members' names were not being recorded in the reports of meetings. This was discussed and it was agreed that effective immediately persons names would be recorded in the minutes once they made a contribution to the meeting.

ITEM 3 (b) MATTERS ARISING FROM MINUTES OF AGM HELD ON **December, 2003**

1. Amendments to the Constitution

The Chairman reminded that members would have received their meeting file in advance and said that the issues relating to the amendments to the Constitution were addressed in detail in the President's report.

Mrs Lynfatt noted that the Association's accumulation of assets and the whole question of what the cess was used for was being questioned and suggested that perhaps if there was some information on the formation of the Association, its history and how the cess charge came into being, then it might answer a lot of questions. She also suggested that the issue of membership could have been dealt with by itself since the assets and cess issue was posing a problem.

The Chairman, at this point, asked if Mrs Lynfatt would not prefer to have the Constitution amended, prior to dealing with widening the Association's membership. Mrs Lynfatt said she did not have a problem with that, however, she reminded that the Board would also be dealing with changes to the assets and reiterated her suggestion of looking back at the history of the Association to deal with the cess issue.

Mr Johnston, at this point, contributed that prior to the cess charge, there used to be one pay bill and this included all the additional costs, such as statutory deductions. He said there was a list of 10 items that was rolled into one and became the cess charge in the 1960's and this charge was then levied on the general cargo and containers. He said if the Association decided to move the cess back to what used to obtain it would be a retrograde step.

Mrs Lynfatt enquired how the cess was ratified, was it at the MC level or was a law passed. The Chairman responded that the Association was in the process of researching the matter and should have further information within the next few weeks.

The Chairman noted an increase in port activities and said one thing that was clear was where the workers on the port had risen to the challenge and were producing, they had to be taken care of.

At this point, Mr Stephen Bell noted that approximately 1½ years ago, the Association did an article on cess in the newspaper and he had suggested to the Communications Manager that this was an important piece of information for members. He said a lot of the members were still not clear of why the cess came about.

Mr Bell continued that if members looked around the region, there were other similar charges which were not called cess. Some called it a "local Administrative Charge" and the same principals that were questioning the cess in Jamaica, were paying this LAC and adding it to the bill of lading and recovering it.

He suggested that a way to tackle the problem was education for all the players in the Port. He noted that the Port of Kingston had not had a strike in a number of years and said perhaps one of the reasons was the workers received proper fringe benefits which came from the cess charged.

CUSTOMS MOU

The Chairman noted that an Actg. Commissioner of Customs was in place and said one of the things the Association had spoken to him about was the implementation of the MOU.

He noted that over the years the Association's relationship with Customs had been good and many elements of the MOU had been in place. Mrs Pinnock added that the new Commissioner of Customs was accessible.

Mrs Robertson-Sylvester said the partnership was going well, however, there was a problem in Montego Bay which was affecting customers. She said an issue with full boxes was affecting the turn around of the boxes. Mrs Lynfatt added that it should be even handed in Kingston and

Montego Bay and said she spoke to Commissioner of Customs about the problem. She opined that they now recognized that there was a challenge in the way in which they handled situations. She felt that a lot of the issues had to do with discretion and said the matter would have to be taken up with Agents in Montego Bay.

The Chairman at this point noted that there was a congestion article in the morning's newspaper.

ITEM 4(a) PRESIDENT'S REPORT FOR 2003

Members were referred to the President's Report which was circulated prior to the meeting, and which the meeting agreed to be taken as read.

The General Manager and his team were commended on the production of the President's report. Members agreed that it was quite a historic production.

The General Manager referred members specifically to Page 15 of the report and noted that this was a soft launch of the Association's website. He opined that it was a good vehicle on which to promote members' business and said that the Communications and Services Department would provide relevant information for members to get advertisements on the site.

Members were also shown a rough cut of a video of the History of the Association and were also given to opportunity to make suggestions after viewing the video.

The General Manager said that a draft of the SAJ history book was received and would be discussed with author and editor and hopefully, the book would be ready for early 2005.

Mrs Robertson-Sylvester at this point noted that the book stopped at a particular date, however, a lot of historic things had taken place since the cut off date. She therefore suggested that the Association consider getting someone to start documenting so that it could have the information ready for the publication for the next 10 years.

Mr Bell commended the General Manager and his team on the history book and the website. He also suggested that the Association attach its website to the CSA's website which was also connected to the Fairplay magazine and which was one of the fastest growing websites.

The General Manager said that the Association would be linking to CSA and other leading websites.

He also took the opportunity to commend Seaboard Freight & Shipping and Jamaica Freight & Shipping for keeping the Association's Tuesday Feature alive, as without these two companies, the Gleaner page would have died.

At this point the General Manager introduced Miss Essetta Chin, Financial Controller, who joined the Association in April.

ITEM 4(b) MATTERS ARISING

There were no matters arising for discussion.

ITEM 5 PRESENTATION OF FINANCIAL STATEMENTS

I The Shipping Association of Jamaica

(a) Audited financial Statements to year end 2003 December 31

Miss Essetta Chin, Financial Controller, referred members to the audited accounts which were included in their files. She made the point that this was the first year that the Association was adopting the new accounting practice (IFRS) and highlighted the main points in the Income and Expenditure Account for the year and the Balance Sheet as at 2003 December 31.

Miss Chin pointed out that page 33 of the financials showed the effects from Jamaica converting to the new Accounting practice, also Page 38 gave an explanation of what items were affected.

Miss Chin also advised that the restating of 2002 had to do with the reclassification of some items that were included in administrative costs which should have been allocated to Portworkers expenses.

During the presentation, Mr Johnston noted that the Accounts showed that the Association had contributed \$158 Million to security on the Port and felt that this was something that the Association should publicize.

He opined that this should be publicized so that people, particularly the Government could see that the Association remained a committed partner to the development of the Port and he made the point because he did not think that most people understood the level of commitment the Association and its members had to the development of the Country. He said it was important that this was highlighted.

(b) Unaudited Financial Statements for Period 2004 January to September

Miss Chin guided members through the unaudited accounts to 2003 September 30.

II Port Computer Services Limited

Financial Statements to year ended 2003 December 31

Miss Chin presented the Accounts for Port Computer Services Limited for year ended 2003 December 31.

III SAJ Property Limited

Financial Statements to year ended 2003 December 31

Miss Chin guided members through the Accounts of SAJ Property Limited.

Following the Presentation the Accounts were adopted on a motion by Mr Stephen Bell, seconded by Mrs Corah Ann Robertson-Sylvester and carried.

ITEM 6 ELECTION OF OFFICERS

The General Manager chaired this section of the meeting and advised that the Constitution provided for the election of a President, Vice President and seven other members of the Managing Committee at the Annual General Meeting.

(a) Election of President

The General Manager requested that members identify themselves, the company which they represented, and indicate their voting status. This was done per page 1 of these minutes. Mr Riley also advised that he had received Proxies from the following companies:-

<u>COMPANY</u>	<u>PROXIES</u>
Shipping Services (Stev) Ltd	M Bernard
Ship Management Services	M Bernard
Jamaica Freight & Shpg	M Bernard
Interseas Limited	M Bernard
Coastal Shipping	M Bernard
Jamaica Fruit & Shpg	C Johnston
Jamaica Producers Shipping	C Johnston
Jamaica Producers Group	C Johnston
Producers Shipping Company	C Johnston
H McCauley Orrett	L Tulloch
International Shipping	L Tulloch
Grace Kennedy Logistics	D Martin
H Macaulay Orrett	D Martin

(a) Election of President

Nominations were then invited for the post of **President**.

Mr. Harry Maragh was nominated by Mr. Michael Bernard and seconded by Mr Grantley Stephenson.

There being no other nominations, **Mr. Maragh was unanimously elected President for 2005.**

(b) Election of Vice President

Nominations were invited for the post of Vice President

Mr. Michael Bernard was nominated by Mr. Fritz Pinnock and seconded by Mrs Corah Ann Robertson-Sylvester.

There being no other nominations, **Mr. Bernard was unanimously elected Vice president for 2005 by majority vote.**

(c) Immediate Past President

Mr. Grantley Stephenson would remain the Immediate Past President for 2005.

(d) Other Members

Nominates were invited for other members of the Managing committee.

Mr. Roger Hinds was nominated by Mr. Kim Clarke and seconded by Mrs Corah Ann Robertson-Sylvester.

Mr. Kim Clarke was nominated by Mrs Paula Pinnock and seconded by Mr. Grantley Stephenson.

Mrs Paula Pinnock was nominated by Mr. Grantley Stephenson and seconded by Mr. Kim Clarke.

Mr. Charles Johnston was nominated by Mr Roger Hinds and seconded by Mr. Fritz Pinnock.

Mr. Donovan Martin was nominated by Mr. Grantley Stephenson and seconded by Mr. Michael Bernard.

Mrs Corah Ann Robertson-Sylvester was nominated by Mr Charles Johnston and seconded by Mr Ruel Gibson.

Mr Ruel Gibson was nominated by Mr Michael Bernard and seconded by Mr James Worton

Mr. Fritz Pinnock was nominated by Mr Michael Bernard and seconded by Mrs. Denise Lyn Fatt.

Mr Joseph Lowe was nominated by Mr Charles Johnston and seconded by Mr James Worton.

Mr Loxley Tulloch was nominated by Mr Alva Wood and seconded by Mr Donovan Martin.

Mr James Worton was nominated, however, he declined the nomination

Ballots were taken and the remaining **seven members of the Managing Committee for 2005 were elected as follows:-**

Mrs. Paula Pinnock

Mr. Kim Clarke

Mr. Roger Hinds

Mr. Donovan Martin

Mrs Corah Ann Robertson-Sylvester

Mr Charles Johnston

Mr Joseph Lowe

The General Manager said there were two changes to the structure and thanked Messrs James Worton and Ruel Gibson for having served on the Managing Committee.

The General Manager then congratulated the President, Vice President and members of the Managing Committee on their appointment to the Board.

ITEM 7 APPOINTMENT OF AUDITORS

The firm of PricewaterhouseCoopers, having indicated willingness to continue as auditors for the Association, was re-appointed auditors for 2004.

ITEM 8 ANY OTHER BUSINESS

Vibrancy in the Association

Mr Wayne Rhoden started by saying that without membership in the Association, all the things being implemented would not get anywhere and said that the Agents were losing confidence in the MC as they were of the opinion that the MC was doing things without any consultation with the members.

Mrs Lyn Fatt endorsed Mr Rhoden's statement and continued that there seemed to be general apathy. She said in attempting to convene a meeting, there was difficulty getting a quorum and opined that the attendance at Agents Committee meeting was at the worse she had ever seen. She said people had lost confidence in what was happening, as generally, members were not aware of what was happening in the Association.

She cited the Extra-ordinary General Meeting that was being arranged and which was postponed. She said it was arranged and members knew it was arranged, however, they were not really aware of why it was postponed.

Mrs Lyn Fatt said the Association must try to rebuild confidence in its Managing Committee and whoever was in charge needed to ensure that members were aware of what was happening, why and when. She said she was concerned because if she was in charge of a company or association where members were complaining of the difficulties being experienced and not taking any interest in the company, she should have tried to address it long before it got to crisis proportion.

Mr Bell at this point said while a lot of members had concerns, he knew that effort had been made by the Managing Committee to deal with the concerns. He opined that 2004 had been a challenging year and a lot of time was spent trying to deal with some of the obstacles such that the Association perhaps lost sight of some of the other challenges, particularly the one being faced by some of its members.

Mr Bell said when one looked at the Association's accounts, the challenges were evident.

Mrs Lyn Fatt noted the attendance at the AGM and said that this was the most poorly attended AGM she had ever seen in her years in the Association. She said the Association needed to look at its membership and see how best to deal with the situation.

Mr Johnston at this point noted that emphasis was placed on attendance at the Agents Committee meetings and pointed out that quite a few agents sat on the MC. He pointed out that it was not a case of Agents against the Association and opined that if agents were not attending the Agents Committee meeting, perhaps there was need to find out why they were not attending.

Regarding the widening of the Association's membership, Mr Johnston said the Association did not postpone the EGM, it was postponed at the request of one member who asked certain questions and then requested that the meeting be postponed.

He continued that some members of the Association would like to see the demise of the Association and as a result the Managing Committee had to be mindful of this when deciding to widening its membership as this could mean either the survival or demise of the Association.

Mr Johnston noted that the Shipping Industry was changing from power of Agents more to lines consequently, the Association had to be careful how it managed that change.

Mr Rhoden opined whoever was a member of the Association was a member because it had helped them and he did not know why people would want to see the demise of the Association.

He noted that there were agents who were members of the MC, however, that had not helped the attendance at Agents Meeting. He contended that the Agents Committee had better turn outs in past years.

At this point, Mrs Pinnock who was Chairman of the Agents Committee, said with regards to attendance at the Agents meetings, there were some meetings where the attendance was poor, however, one of the main reasons was the congestion on the Port.

Mr Hinds then added that change was taking place and members had to recognize that they had to move with the changes. He also cautioned members not to mix up vibrancy with numbers as a room could be full with people and there was no vibrancy.

Mr Rhoden opined that change agents were part of the change and he felt that it was members who voted members on to MC to make the changes, therefore, the members were a part of the change.

Mr Gibson said he was sympathetic to the view expressed and said that if this was the perception that there was a reduction in vibrancy, it should be addressed. He suggested that the MC extend itself to the benefit of its members.

He also said that Mr Johnston's point that there were people who wanted to see the demise of the Association was valid and it was both the MC and members' responsibility to do whatever was necessary to ensure that this did not happen. He said that MC needed to find a way to involve members in whatever was being done.

Mrs Christine Johnston said there were approximately five agents who were always present at meeting and when the low attendance was noticed, she called a few agents who indicated that the congestion on the port was mainly the reason why they were not present at meetings. Another reason, she said, was that the same things were always on the agenda.

To this the MC said they should not be blamed if members felt that the same things were always on the agenda to which Mrs Johnston said that there were some items on the agenda that took

time.

Mr Bell spoke of the Forum on Trade which was done by the Association which he said had included all members not just Agents and Mrs Robertson-Sylvester added that the Forum was well attended, particularly by people who did not usually attend meetings and commended the Association on a job well done.

Mrs Robertson-Sylvester went on to say that up to August of 2004, the Agents Committee meetings were well attended and opined that those persons who did not attend after that had some difficulties and reminded that there were so many challenges that could prevent the Agents from attending meeting.

She continued that if members had a problem with the Association, they needed to stand up and fix it. She said if there were problems with Agents meetings, the Agents needed to make the meetings exciting and lure people to attend the meeting.

Mr Johnston contributed that the Extra-ordinary General Meeting that was scheduled for November and had to be aborted should have been the vehicle for members to air their concerns. He said the Association hoped to have the EGM so that these discussions could continue and said that legal advice would be sought to ensure that the Association could go forward with some of the changes that were planned for the EGM.

At this point, Mr Hinds said he heard the concerns and the attempts to explain what had happened. He noted that the Industry had had a challenging year, particularly with the passing of the Hurricane. He said Mrs Pinnock indicated that attendance at Agents meetings were good up to September and towards the end of the year the challenges that Mrs Robertson-Sylvester spoke of had to do with the congestion on the Port.

He urged members to look at the broader picture and said that there were other Associations that were experiencing a similar faith. He used the Customs Brokers Association as an example and said they were also experiencing difficulty getting members to attend meetings, therefore, this seemed to be something happening generally.

Mr Rhoden said he would continue to attend meeting and vote to put members on the Managing Committee, however, it was his right to bring his concerns to the meeting.

With respect to communication, Mrs Lyn Fatt said that it was key and how it was passed on was critical. She said she was happy to get the President's report, but unfortunately she got it the night before. She opined that sometimes if the information was disseminated early, members might feel a part of the process.

The General Manager said that management was listening to all the concerns and would do its utmost to ensure that it assisted the Managing Committee to resolved the issues that created disquiet for members. He went on to say that a lot happened in 2004 and the Association had been trying to rebuild its team. He said a new Communications & Services Manager was just employed and was someone well known for his communications skills, therefore members could

expect to see great things.

The General Manager said there was a plan to meet with some of the members before the EGM, however, this did not materialize. He said the progress would continue into 2005.

The President, at this point, thanked members for re-electing him to serve for another year and said he would try to do his best. To the members of the MC, especially Mrs Robertson-Sylvester and Mr Joseph Lowe, he extended a warm welcome and said he looked forward to working with the Committee again. He also thanked Messrs James Worton and Ruel Gibson for having served on the Managing Committee.

There being no further business for discussion, the meeting adjourned at 12:40 p.m.

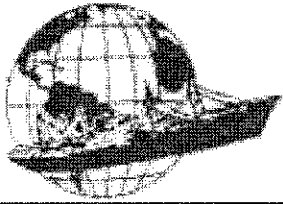
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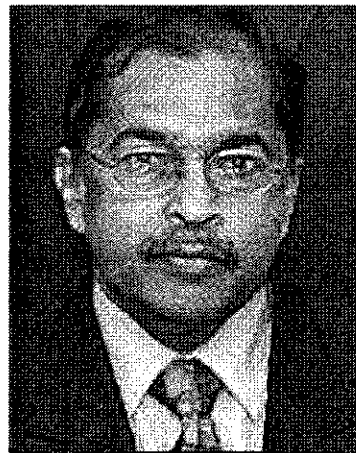
Friday, December 2, 2005

Jamaica, West Indies



ANNUAL GENERAL MEETING 2005

Shipping Association of Jamaica



President's Report

"I am satisfied that we have achieved change at SAJ without any disruption..."

Harry Maragh, SAJ President 2002-2005

I cannot believe that it has been a whole year since my last report at the Annual General Meeting. Similarly, it has been three full years since my election to the office of President.

On the one hand, the time seems to have flown by so very quickly, but on the other hand so much has changed in the shipping industry and at the Association that one could be excused for thinking that a whole decade has passed.

The shipping industry continues to prove itself as the first – and perhaps most – globalised industry on the planet.

The events that take place in the far corners of the globe have an immediate consequence for us in Jamaica and in

other parts of the World. Some of the changes that create opportunities for our local industry and economy, also create challenges of a social and economic nature for our society.

One could use the phenomenal changes in the Chinese economy to illustrate this point.

Chinese demand has been the single greatest driving force behind the current expansion in world shipping.

However, that nation's thirst for oil to fuel its development has combined with war and natural dis-

asters to create a severe fuel shortage across the globe.

Societies like ours that are dependent on imported fossil fuels are finding it increasingly difficult to cope with the new price regimes.

When I joined this industry 25 or so years ago, there were nearly 20 steamship agents operating in the island, many of which represented Liner services that were household names in the business.

Today, there are less than five really viable agents serving regular liner services.

*As consolidation takes hold of global shipping, creating rippling effects in the local industry, those of us who are Agents must ask ourselves:
"What is our best response?"*

President's Overview

Many of those Lines have gone out of business, some of them have been bought by others; and they have taken some of the agents down with them.

While we look at our local industry and interpret some of the changes for our members, we must also embrace some of these developments on the global scene; and seek to reap the benefits that are inherent in such developments.

The agreement for Maersk to purchase Royal P&O Nedlloyd will extend Maersk's dominance as the world's largest shipping line and create opportunities for its shareholders, customers and employees. In the local context, that merger will create opportunities for some but also threats for others.

The signing of the Agreement between the Port Authority and Maersk on November 17 this year to bring an additional 500,000 TEU's to Jamaica is good news for the Kingston Container Terminal.

And it is a welcome endorsement of Kingston as a world



The Purchase of Royal P&O Nedlloyd will Create opportunities and challenges for the global shipping community, including in Jamaica

class port.

However, while we correctly analyse this positive development, we should give serious thought to the future growth and development of the local players in the shipping industry.

As consolidation takes hold of global shipping, creating rippling effects in the local industry, those of us who are Agents must ask ourselves: "What is our best response?"

How can we proactively ensure that we have a role going forward? And what should that role be?

It cannot be to fight like Don Quixote against the windmill, but to assess the new benefits

that are evolving, the new partnerships that are possible and seize the opportunity to invest for the future.

The role of the steamship agent must change if we are to survive in the current and future context. For example, companies like Federal Express and

DHL decided that they were in the business of logistics rather than simply delivery. As such, they created an infrastructure that responded to that business model.

Today, they will move your products and services by any mode available, supporting your business with Just In Time delivery of systems, components and services.

And so it is in the shipping industry that logistics enterprises are springing up. We can sit idly by and watch them grow, or we may decide to play a role and reap some of the benefits. One thing is certain, we cannot operate in the same way that we have been for the last 20 years if we expect to be in the ship-

President's Overview

ping business next year. Yes, as early as next year.

As an Association, we also have to decide how we will face the next 66 years. How do we anticipate the changes in the shipping industry and provide the appropriate support and representation for our membership, our industry, our workers and our staff?

We have spent the last five years looking at our structure and our constitution, with a view to ensuring that we have the correct configuration to meet future challenges.

We began our transformation programme with a view to ensuring that we have the appropriate skillset throughout the organisation.

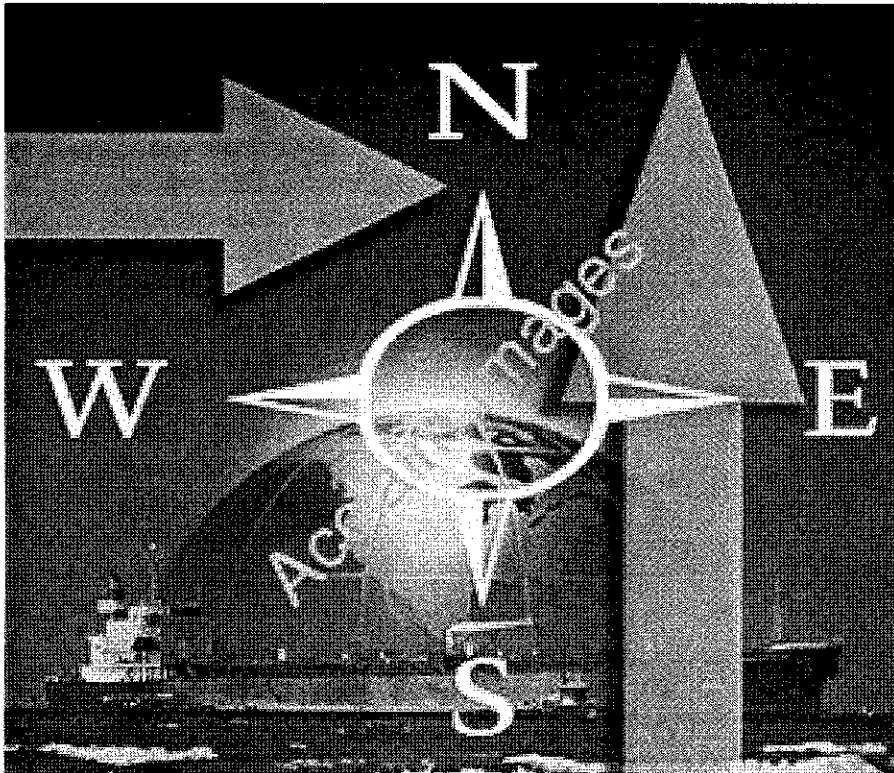
We have suffered some setbacks in the area of staffing, firstly with the untimely death of our former General Manager, Mrs. Pauline Gray.

However, I am satisfied that we have achieved fundamental organizational change without disruption.

We have a new management team in place, with an improved structure to deliver better results for all our stakeholders.

Annual General Meeting. However, faced with opposition from at least one member company, we spent additional time analyzing our objectives and deciding how best they could be met. Our primary objective was to ensure an organisation that was viable going into the future; one that would be as inclusive as possible, without compromising on the principles that have made us strong.

At the Managing Committee level, we have had considerable debates on this issue.



As the business of shipping changes globally, local companies and individuals involved in the industry must find the appropriate responses if they are to remain viable.

We have made conscientious recruitment and selection in some critical areas of operation, and are managing better with less administrative cost as a percentage of our overall operational costs.

On the question of the Constitution, we have spent a lot of time discussing all the options for Constitutional change.

Indeed, members are aware that last year we were prepared to bring some changes to the

We have spent much of the last year reviewing the Caribbean Single Market and Economy and the other global and regional trading arrangements to understand the impact that these will have on our Association.

We have reviewed the structure, constitutions and operations of shipping associations in the region and elsewhere and we have come to the conclusion that our Constitution in its current form will secure the strength and viability of the Association into the foreseeable future.

President's Overview

And while we apologise for not bringing a wider dialogue on this issue as had been promised, the leadership of the Association believes that we should delay

any changes to our Constitution until we have a more thorough understanding of the implications of these changes on our organisation. **Above all, we**

believe the Association should continue to reflect in very strong terms the objectives and aspirations of a local shipping industry – with national objectives -- working in harmony with our international partners.

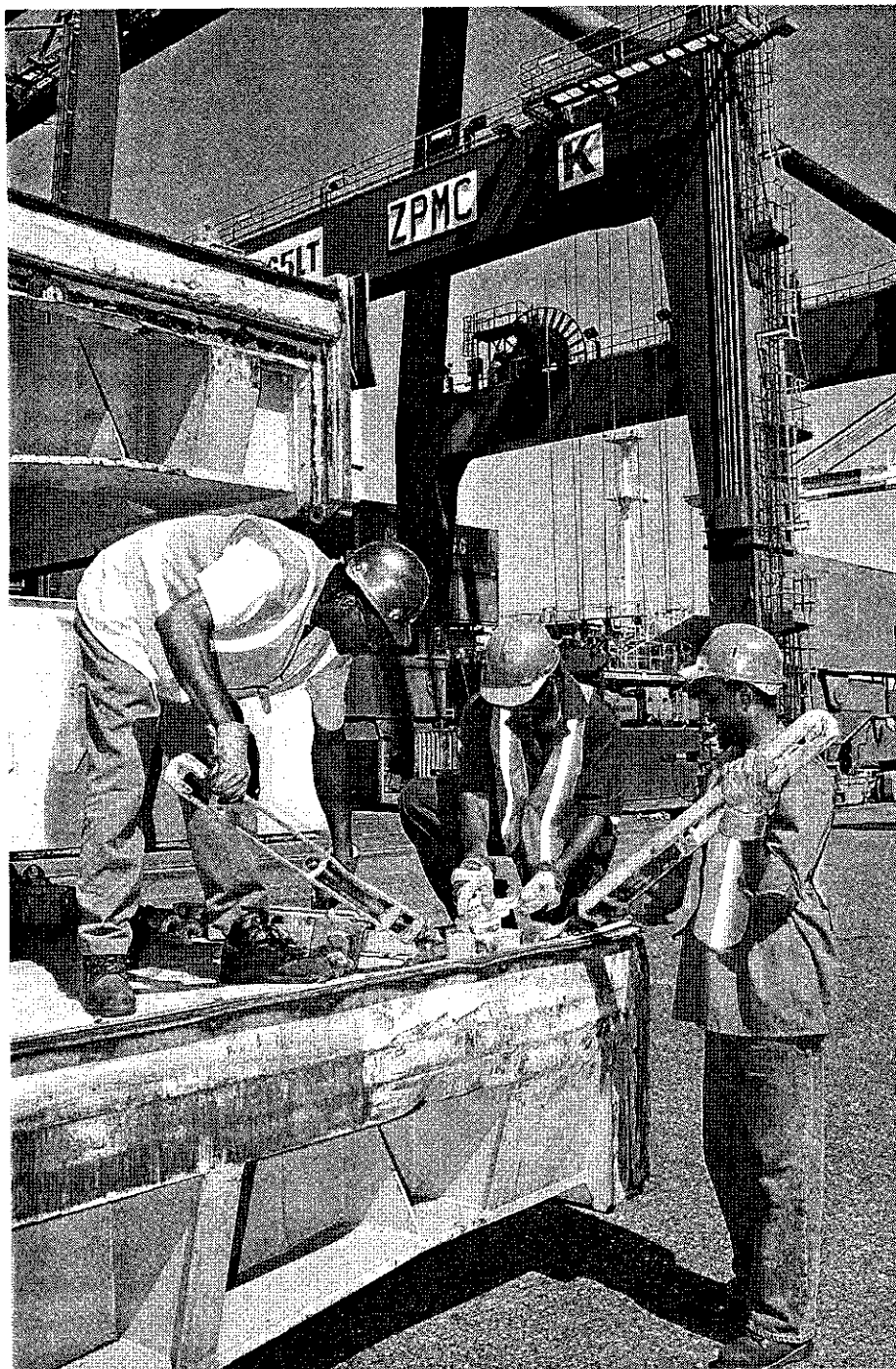
The Cess

Ladies and gentlemen, you may recall that in January 2004 we met with the major Lines calling Kingston and agreed the terms of a Memorandum of Understanding which produced a significant reduction in the rates applied to the container Cess.

The MOU required that the parties should review the level of the Cess at the end of the negotiations with the Joint Trade Unions for a new joint Labour Agreement covering pay and benefits for the workers from November 1, 2004 to October 31, 2006. The new joint Labour Agreement was signed in April 2005.

Despite several attempts on our part, we have not yet had such a meeting.

Members should also be aware that the MOU terms were based on an exchange rate of US\$1=J\$63.5, in 2004, a level that did not materialize until the Third Quarter of 2005. The MOU was also based on the number of domestic import containers moving to 75,000 and domestic exports to 13,000 in 2004.



Training for SAJ workers has to be maintained at the highest international standards

President's Overview

The number of domestic containers to which Cess applied in 2004 was 80,552 imports and 12,688 exports.

The difference in the number of import containers was barely sufficient to cover the foreign exchange related losses in 2004. However, in 2005, the increased port-worker costs cannot be absorbed by the Cess.

Notwithstanding these factors, clearly there was an understanding by all the parties that the level of the Cess would have to be reviewed as the expected increase in portworker pay and benefits took effect with the new Joint Labour Agreement.

We have gone nearly two years on the basis of an agreement that was to last essentially to the end of the 2002-2004 labour contract. As such, there should be no doubt that the current Cess level cannot meet the cost of the labour supply.

This is worsened by the fact that transshipment, an area

that does not contribute to the payment of benefits, is recording the most impressive growth in the Port of Kingston.

With the imminent and future expansion taking place in transshipment, there is urgent

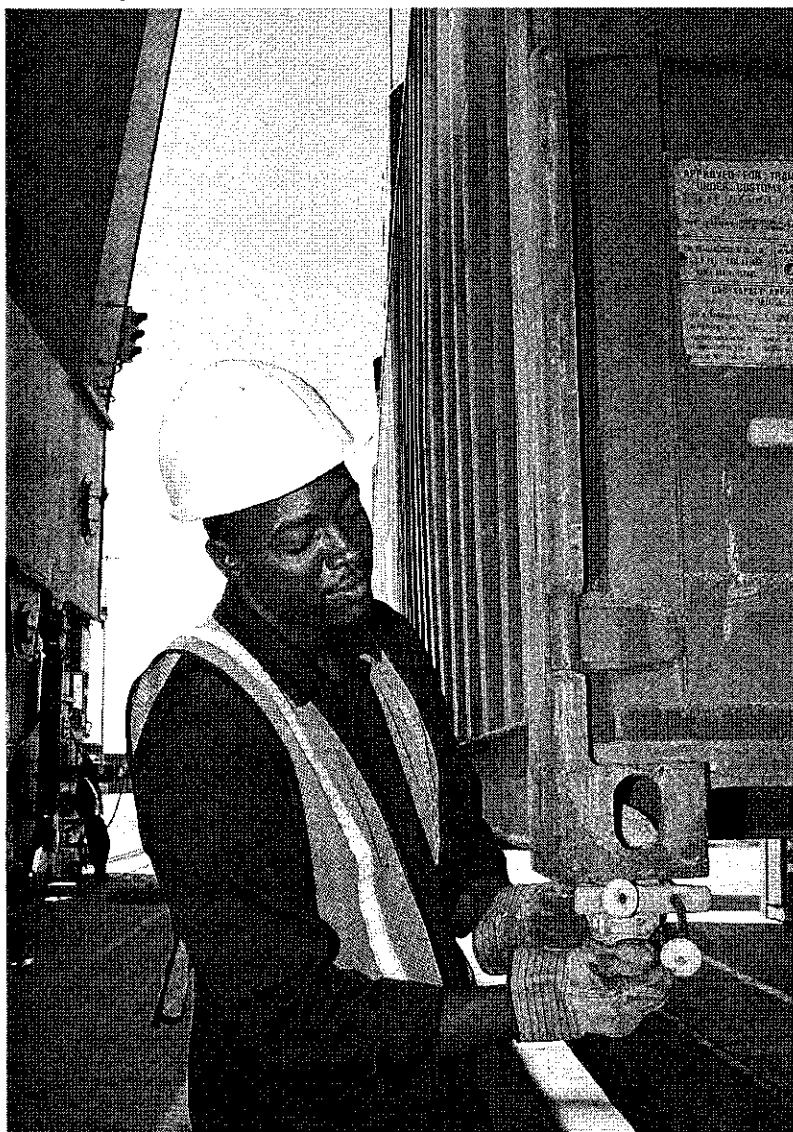
need to ensure that we provide an appropriate level of funding to meet our -- and the Lines' -- obligations to the workers.

You may also note that, primarily in response to the manning needs of the transshipment business, we have had to increase the number of portworkers from 178 at the time the MOU was signed, to the current level of 223.

Our conservative forecast is that we will need to employ at least another 100 men by April 2006 in response to the demands of this growing business.

With the bulk of our labour force concentrated on the service of transshipment, it is more than reasonable that stevedoring costs at Kingston need to be realigned to take this into consideration.

We must also ensure that we continue to provide training and development for our workers to the highest ILO standards, so that they can respond to the changes that are taking place in global shipping.



Our labour force is now over 220, nearly fifty more men since the MOU was signed with the lines. This is to support the growing transshipment trade. We will need to employ at least another 100 by February 2006.

President's Overview

Our workers and the industrial climate that we have created in Jamaica are part of our comparative advantage as a port and we must do all in our powers to protect that.

We do this in the best interest of our nation, our industry, our members, our workers and the Lines who we consider our partners. We continue to pursue opportunities to meet with the Lines to discuss the issue of the Cess, but short of that, we will do what is appropriate to ensure that we can provide adequately for the benefits of the workers.

Port Community System

During the past year, it has become clear to us that the pursuit of a port wide community system is not a viable proposition for the Shipping Association of Jamaica.

Such a system relies on a significant contribution of data by the Terminal Companies and a sharing of revenues with them.

As most of you know by now, both Kingston Wharves and KCT have commenced planning to introduce their own solutions.

In fact, Kingston Wharves has started testing. For a port community system to work for SAJ, we would need the collaboration of the two wharf companies, but we would also need to earn revenue from data which they will be providing freely and directly to their customers.

As such, we will put this plan on the shelves and continue to monitor developments at the two wharf companies to discover whether any opportunities may evolve for us to revisit this issue.



Our Shipping Industry Awards Banquet was the biggest and best it has ever been. It was praised by the shipping industry and the wider Jamaican business community. Grantley Stephenson, (left) Chairman and CEO of Kingston Wharves, was selected as Shipping Industry Personality of the Year 2004. His award was presented by the President of SAJ, Mr. Harry Maragh. Master of Ceremonies is Hon. Oliver Clarke, Chairman and CEO of the Gleaner Company Limited.

President's Overview

On the other hand, we can be proud of the accomplishment of the SAJ in terms of the successful implementation of the demurrage/detention collection company, Assessment Recoveries Limited (ARL).

As most of you know, ARL has been operating now for a year and four months and has exceeded most of the expectations of even its principal advocates.

The Company started out representing three of the lines calling Kingston and at present represents 10 Lines. ARL has created discipline in the market place and has created huge efficiencies in the administrative and finance departments of all the agents whose lines it represents.

Newport West Industrial Park

I also have the pleasure of reporting that we have begun the process to create an Industrial Zone in the Newport West business district. As you know, Newport West suffers from a range of maintenance related problems affecting our drainage, solid waste and roadways. This is compounded by the increasing threats to the corporate and personal security of the local community.

The Managing Committee believes that among the menu of solutions to the problems of



the Newport West community is the creation of an Industrial Zone in the area, with the extension of the boundaries of the port to Marcus Garvey Drive.

This would involve the construction of a perimeter fence along Marcus Garvey Drive from Fourth Avenue to Ninth Avenue, the erection of security gates and the extension of the Access Control modalities to this new perimeter.

The Project would also involve the creation of a system of Management for the *Port Bustamante Industrial Park*, to provide for the organization and administration of services in the community and to liaise with relevant government departments which have an interest in the affairs of the community.

We have conducted wide consultations on the proposal and have received the overwhelming support of land owners, tenants and the entire business community in Newport West.

We have the support of organisations like the Newport West

Corporate Citizens Association, The Customs Brokers Association, The Port Trailer Hauliers Association and other interest groups. We have reviewed all the relevant legislation and regulations that affect such a proposal. The next step is to cost out the project and move to implementation. With the full financial support of all stakeholders, we should achieve this within 12 months.

SAJ History

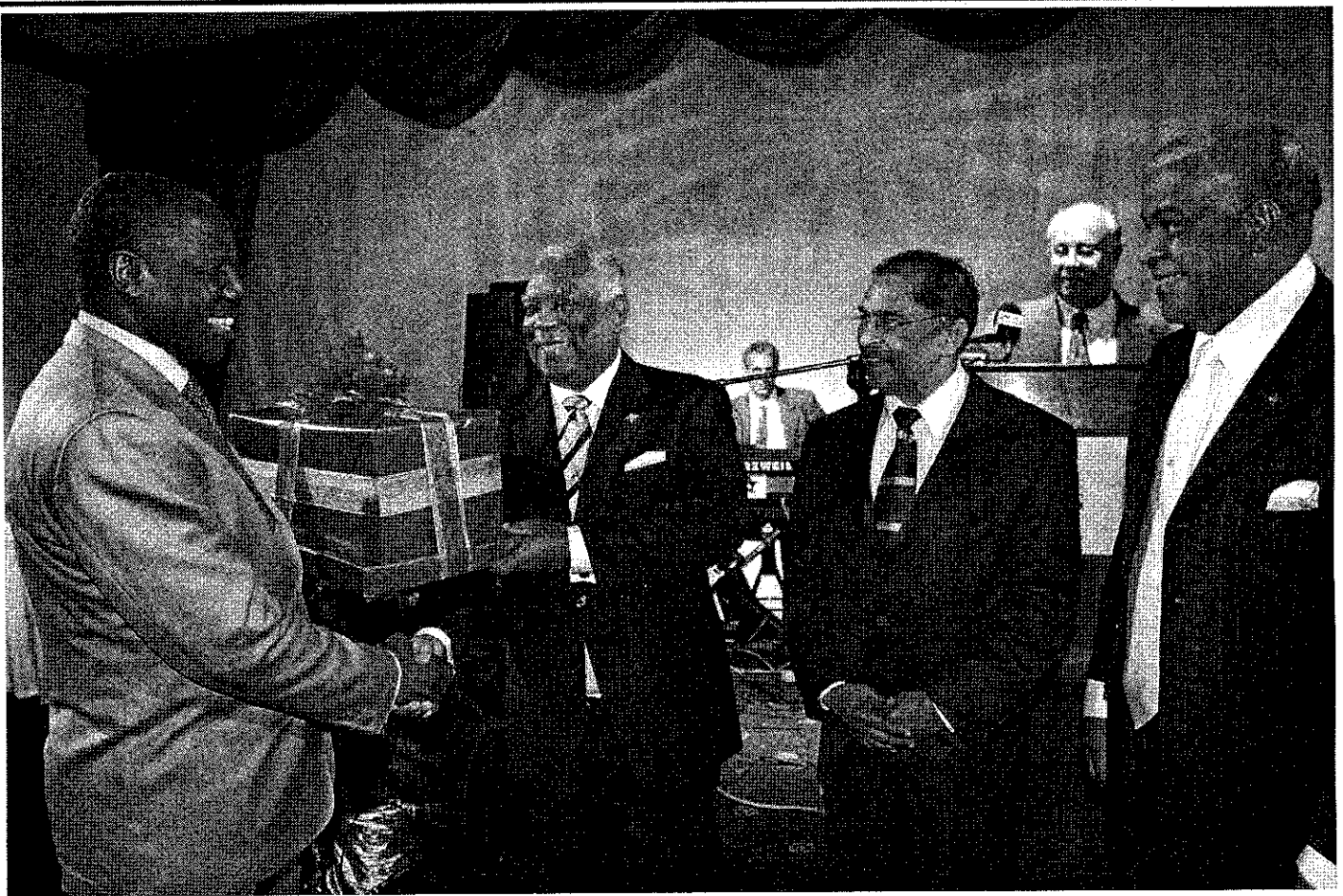
As I reported last year, we received the draft of the SAJ History book that was being written by Mike Jarrett, but were disappointed that after such a long time in the making, the manuscript spoke less about the contributions made by the SAJ and more about the evolution of the Jamaican society during the time of the SAJ.

While such an approach has its merits, it could not work for the SAJ. In any event, other writers have taken such an approach.

After much discussions and negotiations with Mr. Jarrett, we took the view that we should start the project over with a new writer.

We engaged Mr. Anthony Johnson, with whom we have collaborated on other book projects, and I am happy to say that we are on schedule now to deliver a book within the First Quarter of 2006.

President's Overview



At the Shipping Industry Banquet and Awards Ceremony, The Hon. Noel Hylton, President and CEO of the Port Authority of Jamaica was presented with the Shipping Industry Lifetime Achievement Award. He was also presented with several other gifts, including one from the Presenting Sponsor of the Ceremony, the Bank of Nova Scotia Jamaica Limited. Here the gift is presented by the Bank's President, Mr. William Clarke, CD. Also presented at SAJ President Mr. Harry Maragh, and the Honourable Minister of Transport & Works, Mr. Robert Pickersgill.

Raising the public profile of the Shipping Association of Jamaica

We have been receiving chapters of the book for review and expect to get a complete manuscript for review over the Christmas holidays. I promise that you will enjoy the book.

My colleagues, this has been a year in which we have achieved some important milestones in maintaining the relevance of the SAJ and raising the profile of the Association within and outside of the shipping community.

You may be pleased to know that at the last Annual General Meeting of the **Private Sector Organisation of Jamaica (PSOJ)** in September, the SAJ was voted onto the Executive Committee of that key organisation.

Our **Shipping Industry Awards Banquet** was the biggest and best it has ever been, and won the veneration of the shipping community as well as the wider Jamaican business

community. We thank in particular the Bank of Nova Scotia Jamaica Limited who came forward with a cheque for J\$1-million to make it happen.

We also thank The Port Authority of Jamaica, APM Terminals Jamaica Limited and Kingston Wharves Limited for the considerable support. I once again congratulate the President of the Port Authority of Jamaica who won the Lifetime Achiever Award; the Chairman of King-

President's Overview

ston Wharves, Mr. Grantley Stephenson, who was Shipping Industry Personality; our General Manager, Mr. Trevor Riley for his award of Shipping Industry Manager; Portworker of the Year Mr. Trevor Walker and Administrative Employee of the Year, Mrs. Dionne Gordon of the SAJ.

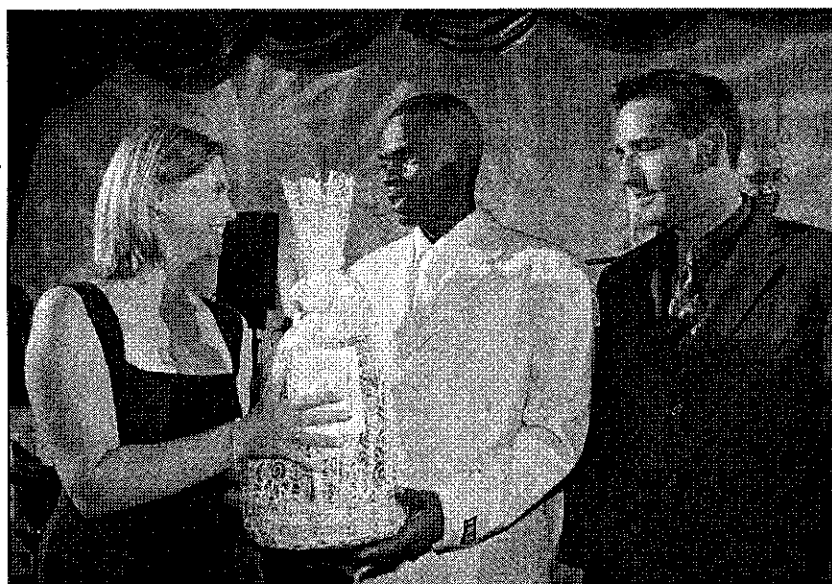
Our **Shipping Industry Benefit Golf Tournament**, held in April this year, won support of corporate Jamaica in two important ways: In terms of sponsorship, where we raised over J\$1-million to assist in purchasing a bus for the Caribbean Maritime Institute; and in terms of the participation of players, who include managers and directors some of Jamaica's most recognized companies.

So overwhelmingly successful was the golf tournament, that we have planned to make it an annual event, with the next staging on April 22, 2006.

It will again have the support of the Jamaica Golf Association and will be held at the Caymanas Golf and Country Club. Again proceeds will benefit a needy charity which is supported by the SAJ and the industry as a whole. During the year, we launched the **SAJ's Corporate Video** on DVD Rom, and have

been systematically distributing it and having it shown locally and internationally. Those of you who have viewed it will testify to the high quality production and the wonderful treatment of the SAJ story.

We continue to play a leading role in the Caribbean Shipping Association, not only as host of the Secretariat, but as key decision-makers at the Council and Conference levels.



Runner up to the Portworker of the Year 2004, Dave Burgher, receives his prize from Mr. and Mrs. Peter Ford. Mr. Ford is the General Manager of APM Terminals Jamaica Ltd., an event sponsor.

Our MC member, Mrs. Corah Ann Robertson-Sylvester was returned for a third term as President of the organisation. I will continue to serve, as will Mr. Grantley Stephenson, for at least another year as a member of Council. For my own part, I wish to thank the membership for the confidence that you have reposed in me to serve you as President over the last three years.

It has been a period of great transition for the industry and for the Association; and we are still evolving.

Although I intend not to seek re-election as President at this time, I will continue to be available for service to the Association in whatever other roles are deemed appropriate by the membership.

The Shipping Association of Jamaica has been a good training ground for me and I intend to continue giving back.

I wish the new President success in the role and offer my support in the achievement of the Association's objectives.

I entrust the balance of this report to the members present and invite you to read the ensuing pages which provide further details of our achievements over the last

year.

**Harry P. Maragh,
2 December 2005**

The Economic Environment

The Governor of the Bank of Jamaica (BOJ) reports that Inflation was 4.3% for the September quarter of 2005, or 1.2 percentage points above the seasonal average of the past five years. This was mainly due to the effects of rising international oil prices and the challenges of the most active hurricane season in living memory. With inflationary impulses unfolding from as early as the June quarter, the BOJ reports that it maintained a conservative policy stance. Consequently, core inflation was contained to 1.4 per cent for the September quarter.

Despite the anticipated fall-out in Agriculture, the BOJ is still expecting inflation to fall in the second half of the fiscal year (October to March), relative to the April to September period. The forecast for the full fiscal year therefore remains in the 15 to 16 per cent range.

The outlook for the domestic economy for the medium term remains positive due to an expected expansion in the December quarter driven largely by Mining and Construction, along with a rebound in Tourism. However, the BOJ is not expecting growth to be as robust as had been originally expected. Agriculture is forecast to record a marginal decline relative to the full recovery that the Government had previously predicted.

The increased demand for foreign currency assets contributed to some instability in the foreign exchange market in the July-September Quarter, resulting in a depreciation of 1.7 per cent in the weighted average selling rate of domestic currency vis-à-vis the US dollar. This is in con-



trast to the marginal appreciation of 0.02 per cent recorded in the previous three quarters.

The BOJ has continued to sell foreign exchange to the market in order to ensure that the foreign exchange flow needed to sustain commerce and other current transactions remains adequate. At the same time, the Bank has also sold securities from its own stock to the market so as to reduce the excess Jamaica Dollar liquidity that would facilitate increased demand for foreign exchange.

Going forward, the BOJ expects

the foreign exchange supplies to the market to increase by December, as tourism and private sector flows improve. With the instability that emerged in the foreign exchange market during the quarter, the net international reserves (NIR) was US\$2.12 billion at the end of September, declining by US\$37.8 million relative to the end of June.

At the beginning of January 2005, the exchange rate of the Jamaican dollar to its US counterpart was J\$61.76 to US \$1.00 and at October 30 the exchange rate was J\$63.47 to US\$1.00.

Against this background, growth in the economy is expected to continue albeit at a slower rate than originally projected.

The Shipping Association revenue has continued to decrease due to a reduction in cess rates of about 39% since 2004. More information will be provided on this during the reading of the Financial Statements by the Financial Controller.

For the nine-month period, January to September 2005, the Industry handled 106,404 metric tons of breakbulk cargo and 68,894 domestic containers.

This level of activity compares with 201,250 metric tons of breakbulk cargo and 60,622 domestic containers for the corresponding period in 2003; and 96,280 metric tons of breakbulk cargo and 64,472 domestic containers in 2004.

Communications, Member Services & Community Outreach

The provision of timely and relevant information to members, while offering valuable services that

help to improve the viability of the sector and strengthen partnerships within the shipping industry and with allied sectors, were areas of primary focus for the Communication & Member Services Department during 2005.

At the start of the year, the new Manager of the Department tabled a Communication Programme that proposed plans for leveraging the strengths of The Shipping Associa-

tion of Jamaica to provide services in areas of proven competence such as human resource development and finance.

The Managing Committee approved the proposals and a series of seminars and workshops will be staged in 2006.

The Communication Programme also proposed a Strategic Visioning Workshop with the objective of formulating a shared Vision for the sector. It was suggested that industry partners should also be involved

in the process of developing a cohesive vision for the sector so that commitments can be made toward its realization.

On the following pages, we report on progress made in the Communications Department.



The year in review proved to be a particularly active one for the Agents' Committee, which also had a change in leadership with Mr. Donovan Martin taking over from Mrs. Paula Pinnock as Chairman. Apart from its regular monthly meetings, a number of specialist meetings were held to examine and discuss issues of sectoral, national and international importance. One such workshop was held with the new Jamaican Ambassador to China, His Excellency, Mr. Wayne McCook, who took the opportunity to meet with the SAJ to discuss the Jamaican Government's priorities in its relationship with the Asian state.

Communications, Member Services & Community Outreach

Agents' Committee

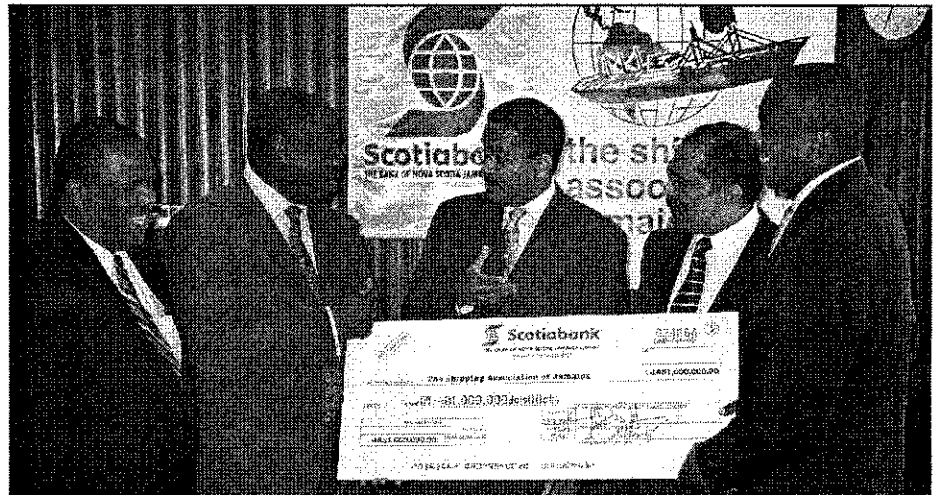
The year in review proved to be a particularly active one for the Agents' Committee.

Apart from its regular monthly meetings, a number of specialist meetings were held to examine and discuss issues of sectoral, national and international importance.

The presence of representatives from the Jamaica Customs Department, the Jamaica Customs Brokers Association and other organizations, at particular meetings, continue to prove immensely useful in addressing concerns and clarifying matters that affect members.

During 2005, this committee addressed a number of issues that included:

- Port Congestion Charges
- Port Security
 - VACIS screening procedures
 - Port Bustamante's Programme for Electronic Access Control
- Customs Matters:
 - New Customs Penalties
 - Abandoned Cargo
 - E-Manifests
 - Revisions to the Customs Act



The Bank of Nova Scotia was instrumental in ensuring the staging and success of the Shipping Industry Awards Ceremony, by donating J\$1-Million as presenting sponsor. Here BNS President William Clarke (Second left) presents an enlarged replica of the cheque to the SAJ delegation of (From left) Michael Bernard, Vice President; Grantley Stephenson, Immediate Past President; Harry Maragh,

It should be noted that at the start of the year agents were voicing numerous concerns regarding Customs procedures but that the regular attendance of Customs representatives at meetings have helped to address most of these matters.

1. Clarification of Application of the GCT
2. Errors and Omissions Insurance (Shipping)
3. Disaster Preparedness in the Newport West area

A seminar was arranged with the Office of Disaster Preparedness and Emergency Management (ODPEM) in September.

- Negotiating Position of the Sector for the CSME, FTAA and WTO (GATS)

Special meetings were convened to examine the following drafts of Acts under Parliamentary consideration and to make recommendations from the Sector:

- The Port Authority of Jamaica Act
- The Electronic Transactions Act
- The Access to Information Act



Second staging of the event will take place on April 22, 2006 at the Caymanas Golf and Country Club, St. Catherine, to raise funds for SAJ charities. Please support.

Communications, Member Services & Community Outreach



Shipping Association of Jamaica Managing Committee 2005

SAJ History

Following on the Managing Committee's decision to have Senator Anthony Johnson write the book, the Department worked closely with the new author in researching documents, supplying photographs and information, and arranging interviews. Draft Chapters have been circulated to members of the Managing Committee for their comments and these have been forwarded to the author.

The Department has also coordinated the provision of messages to be included in the book and we can look forward to a Launch in early 2006.

Trade Agreements

In developing a negotiating position for the Shipping Industry on CSME, WTO (GATS) and FTAA, papers were prepared by consultant Karen Adair.

The CSME position paper was considered by the Managing Committee at a special meeting and in October, a team comprising MC representatives, the General Manager and the Communication & Services Department presented the SAJ's position to the Ministry of Foreign Affairs and Foreign Trade (MFAFT).

The SAJ was invited to be a representative on the Jamaica Trade Adjustment Team's Working Group.

The first meeting of the Jamaica Trade Adjustment Team's Working Group on Services was held in November to formulate policy positions on crucial areas of the services sector, ahead of the meeting of the CARICOM Technical Working Group on Services (7-9 November 2005); the WTO Ministerial Meeting (Hong Kong, 13-18 December 2005) as well as the Canada-CARICOM, CARICOM-Dominican Republic and EPA negotiations.

Communications, Member Services & Community Outreach

General Media Coverage, media liaison, publicity and promotion

The SAJ expanded its publicity during the year, with press exposure going beyond the Shipping Page and the print media to include radio and television coverage, interviews and programme sponsorship.

Television coverage was received for the SAJ sponsorship of the KSAFA Under-15 Football Competition, the Shipping Industry Benefit Golf Tournament and the Shipping Industry Awards Banquet.

Radio interviews were arranged for discussion of issues including the port congestion charge and Maritime Awareness Week.

Radio Programme sponsorship that included interviews were: Power 106 "Laing & Company" coverage of the China-Caribbean Trade Fair in February and Power 106 "Trade Talk" in September that focused on the Joint Industrial Council.

The SAJ also sponsored a live outside broadcast, from the Conference Room, of the KLAS radio programme "First Edition" during Maritime Awareness Week, that focused on the work and achievements of the SAJ.

The Department also engaged in research for the preparation of speeches and statements by SAJ spokespersons.

Media Liaison

The department continues to foster a healthy relationship with the press, ensuring that all queries are answered promptly or that reporters are directed to the appropriate organizations. In 2005, we responded to over 80 queries from the local and overseas media regarding port security, new developments in shipping and requests for sponsorship of press features and broadcast programmes.

Internal Communication

The Department continues to be the main avenue for dissemination of information to the wider SAJ membership and staff. These included invitations to participate in activities arranged by the HRD, including visits from the Registrar General's Department, on-site mammogram, pap smear and other health tests. Status reports received from the terminals, the issue of reports and new regulations from

government and non-government organizations and notices pertaining to safety in the community were some of the other issues communicated to members.

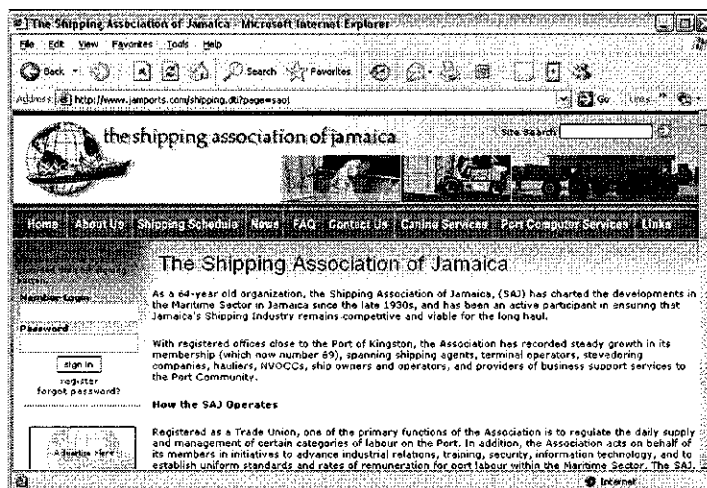
Newsletters

One issue each of "Ship to Shore", the SAJ's Industry Newsletter and "Team SAJ", the SAJ Staff Newsletter were published in 2005. Plans are underway to involve more persons in the production of these newsletters so that more issues may be produced annually.

SAJ Website

The website, www.jamports.com is being regularly updated by the department and plans are underway to maximize its benefits to our members and to market the site commercially.

It is proposed that the Official Launch of the website coincide with that of "The History of the SAJ" in 2006.



Screenshot of the Shipping Association of Jamaica Website found at: www.jamports.com

As a special offer, members who call quickly can advertise on the site free of cost for a period of six months starting 1 January 2006.

Communications, Member Services & Community Outreach

Community Outreach

While continuing to provide meaningful assistance to the community of Greenwich Town, the SAJ is expanding its outreach to the wider community in the areas of Sport and Health Care.

In Sport, the SAJ sponsored the KSAFA Under-15 Tournament and assisted Boys' Town in purchasing gears for their football team; and in Health Care, we are joint sponsors of the Jamaica Wellness Tour that begins in 2006.

With regard to our relationship with Greenwich Town, we have focused our efforts on providing health services to senior citizens and educational services to young children.

In 2005, the community outreach clinic operated every two weeks and we continued sponsorship of the Marcus Garvey Basic School. As is customary, the SAJ organized the Annual Christmas Treats for the elderly and students of the

Marcus Garvey Basic School. SAJ members and staff took the time to personally assist in these programmes.

We also assisted the Greenwich Town Major League Football Team to purchase gear.

Outreach Clinic

The SAJ's Community Outreach Clinic serves the residents of the Greenwich Town/Kingston 13 community and has been in op-

nity. The services provided include a free doctor's consultation, and free medication as available.

The SAJ also provides follow-up care for patients with chronic diseases such as hypertension, who have been discharged from the outpatient clinics of the Kingston Public Hospital (KPH).

Patients are also referred to both the emergency department and the various outpatient clinics of the KPH or the National Chest Hospital when inpatient or specialist care is deemed appropriate.

Marcus Garvey Basic School

During 2005, the SAJ maintained its sponsorship commitments to the Marcus Garvey Basic School, subsidizing the teachers' salaries for seven (7) months of the school year. The Association also provided subventions in other areas, such as the provision of basic medical supplies.

A new Principal has been appointed and the Ministry of Education has agreed to fund the post for the first time.



The SAJ Mobile Clinic continues to provide a benefit to the residents of Greenwich Town and is one of the positive avenues of interface between the shipping industry and the local community.

eration since 2002. There have been approximately 2,000 visits to the clinic since its inception and this is indicative of the demand for this service that offers free health care to the commu-

Communications, Member Services & Community Outreach

The SAJ obtained the necessary information from Blue Cross Jamaica for a simple health insurance scheme that has since been implemented by the school in partnership with parents.

SAJ's sponsorship has also helped with acquiring resource materials, the school-leaving function and the Annual Christmas Treat for students. We must also acknowledge the direct contribution from members to the institution.

The SAJ now has two (2) seats on the School Board.

Senior Citizens Treat

More than 150 senior citizens of Greenwich Town benefited from meals, entertainment and gift packages of grocery items at last year's Annual Christmas Treat and we plan the same for these Golden Agers on December 13, 2005.



At the Awards function, KSAFA president Stewart Stephenson thanked the sponsors from the local shipping industry on behalf of the 25 Under-15 teams in Kingston and St. Andrew that participated in the competition. The sponsors were: The Shipping Association of Jamaica; Jamaica Freight and Shipping; Kingston Wharves Limited;

Senior citizens in the community look forward to this event with great anticipation and express heartfelt appreciation for the gifts as well as for the efforts of SAJ members and staff to make their Christmas a happy one.

This outreach programme is closely monitored to ensure that only persons who are genuinely in need receive the benefits.

KSAFA Under-15 Football Competition

The local shipping industry, led by the Shipping Association of Jamaica (SAJ), joined forces with the Kingston & St. Andrew Football Association (KSAFA) in support of this year's Under-15 Competition for the Winston Chung-Fah Trophy that kicked off in June.

Charles Johnston, executive chairman of Jamaica Freight & Shipping Ltd. and a past president of the SAJ, was instrumental in garnering the support of the shipping fraternity to the tune of J\$500,000.



Winston Chung Fah, in whose honour the KSAFA Under 15 Football competition is being held, kicks off a match in the series. He is cheered on by Garth Kitson, (left) General Manager Operations, at Kingston Wharves Limited, a sponsor; and Stewart Stephenson, KSAFA President (white shirt right).

SAJ Mobile Clinic

Southern Regional Health Authority

The SAJ's Mobile Clinic was donated to the May Pen Hospital for a period of six months, from January to June 2005, following on the damage that Hurricane Ivan had caused to their outpatient clinic.

The South Eastern Regional Health Authority (SERHA) expressed their great appreciation for the use of the mobile clinic which, they said, "allowed us to continue providing quality health-care services to the people of Clarendon".

The staff of the Clarendon Health Services presented the SAJ with a certificate of appreciation for our contribution.

Jamaica Wellness Tour

The "Jamaica Wellness Tour 2005-2006" is a project of the Rotary Club of Liguanea Plains sponsored by the Shipping Association of Jamaica, Blue Cross of Jamaica Limited and the Jamaica Cancer Society.

The SAJ's sponsorship will take the form of providing the mobile clinic for the duration of the project.

The SAJ will also be responsible

for moving the clinic from one location to the next so long as there is no more than one such move within one week.

The objectives of the project are:

1. To provide medical screening facilities to those persons who face the greatest challenge in accessing such services.
2. To increase the awareness of Jamaicans for the need to adopt healthy lifestyles and preventive approaches to personal health care.
3. To publicise the respective roles of the Rotary Club of Liguanea Plains, the Shipping Association of Jamaica, Blue Cross of Jamaica Limited and the Jamaica Cancer Society.

The goals to be achieved are:

1. To provide medical screening facilities to needy communities in various parishes of Jamaica during a 12-month period from November 2005 to November 2006.
2. To provide medical screening services to approximately 20,000 Jamaicans in the pro-

ject period.

3. To harness the skills, competencies and resources of all project partners in the service of our fellow Jamaicans as a shining example of how much can be accomplished through unified effort toward a common objective.

Guyana Flood Relief

The SAJ President led an initiative of the Association to provide assistance to the people of Guyana who were worst affected by Hurricane Ivan.

Through this effort, we were able to garner industry support to the extent that we were able to fill two containers with much-needed supplies that were sent (one each) to the Guyana Red Cross and Guyana Food For the Poor.

Other Sponsorships and Donations

In addition to major sponsorships, the SAJ has also supported or assisted other charities in the areas of health, education, sports and social upliftment.

We have developed an application system to help ensure that our support is directed at the most worthwhile charities.

Communications, Member Services & Community Outreach

SAJ-Sponsored Awards

During the year under review, the SAJ sponsored two major awards:

- The JEA Exporter Award Jamaica Gypsum and Quarries Limited was presented with the SAJ Award for being "The Exporter with the Highest Tonnage in 2004"
- UTECH Administrative Management Award The SAJ Award for outstanding achievement in the Bachelor of Science Degree in Administrative Management at the University of Technology was presented in April to Simone Ferguson-Treston. She was named "Best Full-Time Administrative Management Student" and is currently working toward being a Chartered Accountant.

Industry Related Activities

Shipping Industry Awards Banquet

Under the Chairmanship of the SAJ's General Manager, the Shipping Industry Awards Banquet was revived to honour the top performers of 2004 and Lifetime Achiever the Hon. Noel Hylton on Tuesday, September 27 at the Jamaica Pegasus Hotel. The occasion also celebrated the 25th Anniversary



HYLTON GETS SHIPPING INDUSTRY LIFETIME ACHIEVEMENT AWARD

The President and Chief Executive Officer of the Port Authority of Jamaica, Noel A. Hylton, (left) was given the Shipping Industry Lifetime Achievement Award at the Shipping Industry Awards Banquet in September 2005. He was recognised for over 40 years service in the Shipping Industry, including his more than 10 years as General Manager of the Shipping Association of Jamaica. He received a citation and a crystal trophy, as well as a gift from the Bank of Nova Scotia, Jamaica Limited, the Presenting Sponsor. The Citation is here presented by SAJ President Harry Maragh (Centre) and The Minister of Transport and Works, Hon. Robert Pickersgill.

of the Caribbean Maritime Institute.

In welcoming guests to the highlight event of Maritime Awareness Week, Mr. Harry Maragh, President of the Shipping Association of Jamaica (SAJ), expressed his pride in the fact that the Awards Ceremony, a long-standing tradition of Jamaica's Shipping Industry, was being revived during his tenure as President of the Shipping Association of Jamaica.

The SAJ President thanked the Organizing Committee for the Event and SAJ members, partners and sponsors who, he said, "were magnificent in their

support and assistance."

The Bank of Nova Scotia played the role of presenting sponsor for the Awards Banquet with strong support coming from Kingston Wharves Limited, APM Terminals Jamaica Limited, the Shipping Association of Jamaica and the Port Authority of Jamaica.

The Selection Committee for the Shipping Industry Awards was chaired by the Honourable R. Danny Williams and included Messrs. Peter Moses and Oliver Jones. Mr. Jones represented the Selection Committee in presenting their report at the Banquet.

Communications, Member Services & Community Outreach

The 2004 Shipping Industry Awards were as follows:

Shipping Industry Personality of the Year

Grantley Stephenson, Chairman and CEO of Kingston Wharves Limited

Manager of the Year

Trevor Riley, General Manager of the Shipping Association of Jamaica

Portworker of the Year

Trevor Walker, Stevedore of the Shipping Association of Jamaica

Administrative Staff of the Year

Dionne Mason-Gordon, Executive Assistant, the Shipping Association of Jamaica

Top Advertiser in the Gleaner's Weekly Shipping Feature

Seaboard Jamaica

Top User of Port Bustamante - Exports

Red Stripe

The Shipping Industry Lifetime Achievement Award was presented to the Hon. Noel A Hylton, President of the Port Authority of Jamaica, by SAJ President Harry Maragh accompanied by the Hon. Robert Pickersgill, Minister of Transport and Works, and Mr. Bill Clarke, President of Scotiabank Jamaica.

A video documentary highlighting the contributions of Mr. Hylton to Jamaica's maritime sector, with messages from Prime Minister P.J. Patterson, ex-Prime Minister Edward Seaga and Minister Robert Pickersgill, was shown on-screen during the function.

The shipping industry banquet was one of a series of national events which were widely anticipated in the 1970s, 80s and 90s, but it is being convened for the first time in a decade.

It seeks to recognize best practice in the local maritime sector, and those honoured are considered to uphold the traditions that have made the industry successful.



Seaboard Jamaica Limited continues to be the main advertiser in the Gleaner Shipping Industry Feature, which is managed by the Shipping Association of Jamaica. Here the SAJ President Harry Maragh presents Seaboard's Managing Director, Mrs. Corah Ann Robertson-Sylvester with a plaque in recognition of her company's support. The presentation was made at the Shipping Industry Awards Banquet in September. The Master of the evenings ceremonies, Hon. Oliver Clarke, OJ, Chairman and CEO of the Gleaner Company (in background) delighted in announcing this award.

Communications, Member Services & Community Outreach

Shipping Industry Benefit Golf Tournament

The inaugural Shipping Industry Benefit Golf Tournament was successfully staged in April at the Caymanas Golf & Country Club. One hundred golfers supported the Caribbean Maritime Institute, the beneficiary of the tournament that was organized by the Shipping Association of Jamaica. At the Awards Luncheon, SAJ

General Manager Trevor Riley, chairman of the event's organizing committee, noted that the event was "a tremendous success in terms of both sponsorship and golfer support". He made special mention of the support from Platinum Sponsors – Kingston Wharves Limited and APM Terminals (Jamaica) Limited.

It was also at the Awards Luncheon, sponsored by

Jamaica Broilers and Lascelles Wines & Spirits, that the SAJ President made the official announcement that the Shipping Industry Benefit Golf Tournament will be an annual event, stating:

"Our members and partners agree that this is a great way to celebrate our relationship, to meet new people and to support worthy causes, so I am pleased to announce that the Shipping Industry Benefit Golf Tournament is now an Annual Event".

In addition to a delectable lunch and valuable prizes, all participants were presented with gifts that included a designer golf shirt from Seafreight Agencies Ltd., golf caps from Seaboard Marine and buns from HTB.

GM Challenger offered a 2005 Chevy Colorado to the first player to make a hole-in-one on the 10th hole, but such luck eluded all golfers on the day.

SAJ Library

The SAJ library continues to be an important research facility for students of the Caribbean Maritime Institute, other tertiary institutions, industry personnel and members of the wider public. In the period under review, the library proved especially useful in providing information for the publication on "The History of the SAJ" and in preparing the video documentary on the Hon. Noel A. Hylton, the Lifetime Achiever.

Sponsors

The Port Authority, Kingston Wharves Limited, Caribbean Shipping Association, The Shipping Association of Jamaica, Caribbean Maritime Institute, Port Computer Services Ltd., Seafreight, Lascelles Wines & Spirits, Seaboard Marine, Jamaica Gypsum & Quarries, GM Challenger, Kingston Wharves Limited, Caribbean Shipping Association, The Port Authority, Seafreight, Lascelles Wines & Spirits, Seaboard Marine, Jamaica Gypsum & Quarries, GM Challenger.

THE SHIPPING INDUSTRY BENEFIT GOLF TOURNAMENT

Saturday April 2 2005

8am Shotgun Start

Caymanas Golf & Country Club

Proceeds Benefit the Caribbean Maritime Institute

Communications, Member Services & Community Outreach

Caribbean Shipping Association (CSA)

In January, Jamaica was venue of the first meeting of the year for **the General Council of the Caribbean Shipping Association**. The meeting discussed a number of important issues relating to the region's maritime industry, including environmental concerns and the advent of the Caribbean Single Market and Economy.

The Shipping Association of Jamaica hosted cocktails and dinner at Strawberry Hill for members of the CSA's General Council. At that function, Mr. Harry Maragh, President of the SAJ, assured the delegates that "the

entire membership of the SAJ stands firmly with the CSA in all its plans for ensuring that the voice of our sector in the Caribbean is heard in all the regional, hemispheric and international fora". A delegation of the Shipping Association of Jamaica (SAJ), led by President Harry Maragh, represented Jamaica at **the Caribbean Shipping Association's Fourth Annual Executives Conference** held in St. Vincent and the Grenadines in May.

The fourth annual conference of leaders and managers in shipping (an event which evolved out of the Caribbean Shipping Association's Semi-annual General Meeting) covered topics and

issues critical to operations and business success. During the first two days of the conference, delegates received presentations and discuss critical issues such as:

- trade unionism and port operations in the Caribbean
- general coverage and port insurance including mitigation coverage
- the effects of the CSME on customs laws
- environmental concerns as regards dumping
- ISO registration – challenges involved for ports, and
- a Cruise Industry Symposium

It was during his presentation on "trade unionism and port operations in the Caribbean" that Alvin Sinclair, Assistant Island Supervisor of the Bustamante Industrial Trade Union (BITU) stated that "The Joint Industrial Council (JIC) is the mainstay of stability at the Port of Kingston and I recommend this system of industrial relations to other Caribbean ports."

The President of the SAJ also led the Jamaican delegation that participated in the **35th Annual General Meeting of the CSA** in Barbados in October. The meeting saw SAJ Managing Committee Member Corah Ann Robertson-Sylvester returned unopposed for a third term as President of the CSA.



Members of the Jamaica delegation at the Caribbean Shipping Association's "Shipping Executives Meeting" in St. Vincent. In foreground is SAJ Vice President Michael Bernard and beside him are Frances Yeo, General Manager of ARL and SAJ General manager Trevor Riley. MC member Joseph Lowe is behind Mr. Bernard.

Communications, Member Services & Community Outreach

Another Jamaican, Denise Lyn-Fatt, managing director of Freight Handlers Limited, was inducted into the CSA's Silver Club for those holding membership for 25 years or more. The Hon. Noel Lynch, Barbados' Minister of Tourism and International Transport, officially opened the conference at the Barbados Hilton Hotel.

In his address, the Barbadian minister challenged the Caribbean maritime industry to maximize the vast potential of the region's maritime environment "through creative and innovative projects". He noted, for example, "Intra-regional passenger travel by sea has never been fully exploited and represents an area of opportunity".

At the same time, Lynch congratulated the CSA for strengthening the voice of the Region in global negotiations and in providing a forum for greater regional cooperation in maritime development.

In her report to the conference, CSA president Corah Ann Robertson-Sylvester, urged shipping industry personnel from across the Caribbean and Latin America to bring flexibility to their business planning and to embrace change. "Change, we know, is constant and the winners in a changing world are those that have the flexibility to maneuver successfully in the rapidly changing and fluid business environment" the CSA president said.



The Caribbean Shipping Association Shipping Executives Conference was held in St. Vincent and the Grenadines in May 2005, and was opened by Prime Minister of that nation, The Hon. Ralph Gonsalves, who is pictured left with CSA President, Mrs. Corah Ann Robertson-Sylvester

Mrs. Robertson-Sylvester said that one of the most important components of globalization is international transport and logistics, noting that "...while many traditional activities and operations are being overtaken by modern systems and ideas, there are exciting and extremely rewarding opportunities for

developing new services."

The CSA's Annual general Meeting and Exhibition is the largest single event in Regional shipping and, as such, attracts delegates, speakers and observers from more than 20 countries in the English, Spanish, French and Dutch Caribbean; South, Central and North America, and Europe.

Communications, Member Services & Community Outreach

Zelus Conference

In November, a conference organized by Zelus Events under the theme "Jamaica: The Next World Maritime Centre", was staged at the Jamaica Pegasus Hotel.

Day 1 of the Conference was chaired by the President of the Shipping Association of Jamaica and the Hon. Robert Pickersgill, Minister of Transport and Works, delivered the Keynote Address. Speakers and presenters included SAJ members who are leading experts in their fields and who provided the delegates with the latest information relating to new developments in Jamaica.

They led discussions on key issues such as container transshipment, terminals infrastructure and cargo traffic, Jamaica as a logistics centre, and the country's strategic position as a future world maritime centre.

SAJ Corporate Video

At the 2004 AGM, the 12 minutes video was reviewed by members and comments noted



Stephen Chang, the overall winner and Jodi Munn Barrow, the ladies champion in the inaugural Shipping Industry Benefit Golf Tournament which raised over \$1-million from sponsors and golfers and which allowed the SAJ to contribute to the purchase of a bus for the Caribbean Maritime Institute.

for editing that has since been completed. The video is now incorporated in our orientation and training programmes and is a useful tool in publicizing the work of the SAJ at Expositions, Career Days, Symposiums and other fora.

Public Enquiries

In the period under review, the SAJ responded to more than 200 public enquiries, usually

pertaining to the importation and export of goods, contact details on agents or lines repressed in Jamaica, and information on Customs.

Shipping Industry Sport Competition

The SAJ and the SAJ Sports Club are continuing collaboration on plans to introduce industry-wide sport competitions that aim at bringing together our Members and Partners in friendly contests. Six-a-side football matches have been taking place among SAJ Portworkers, SAJ Administrative Staff, Maritime & Transport Services Ltd. and Caribstar.

Plans are now being put in place for a Shipping Industry Domino Tournament organized by the SAJ Sports Club. The football field is now in need of repair and the cost of doing so is being determined.

The recent rains have prevented repairs to the rear parking lot of the SAJ, but plans are in place for it to be repaired and marked out for a Netball Court.

Already, a netball team from Maritime & Transport has reserved use of that practice court. A netball practice roster for all teams in Newport West is to be developed.

Human Resource Development

Labour Relations

All parties signed the Heads of Agreement for the Labour Contract covering the period November 1, 2004 to October 31, 2006, on April 26, 2005. This followed nine months of intense negotiations.

Notwithstanding these lengthy talks, the implementation of the agreed items was relatively smooth and was actually completed by the end of May 2005.

The major items that were agreed under the new Heads of Agreement include a new Occupational Injury Procedure, new terms for Payment During Illness, substantially removing the factors that have given rise to abuse of this privilege.

The amendment clearly outlines the conditions under which employees with cases of non-occupational injury or illness can access sick leave entitlements. Also agreed are wages increase of 10% in Year 1 of the contract and 6% in Year 2. One significant feature of the 2004-2005 nego-

tiation was the introduction of a Delegate's Code of Conduct, which provides a guide to delegates as to management's expectations concerning conduct at the workplace.

Appraisal System

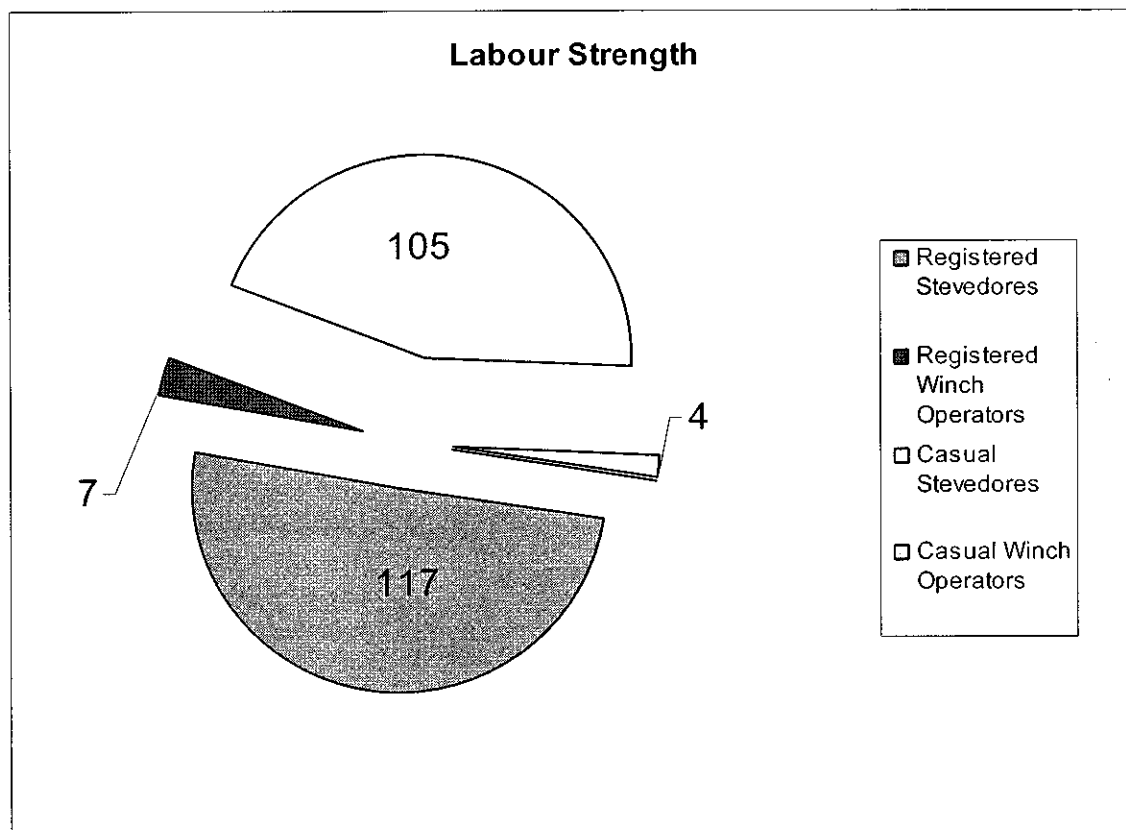
Training was conducted for a new and improved appraisal system, which over time will seek to align employee performance with compensation. Staff appraisals are being conducted during November and the first week of December 2005, the results of which will provide the HRD Department with critical data to develop an overall human resource development plan.

The Labour Force

During the period under review, the Association recruited 47 persons in the category of casual stevedores. At present, the Association employs 233 Stevedores.

OCCUPATIONAL HEALTH AND SAFETY

Several meetings were held with officials from the Ministry of Labour, with the first meeting on March 16, 2004 with Honourable Minister Horace Dalley where representatives of the Joint Industrial Council discussed the ratification of ILO Conventions on Port Safety, Nos. 152 and 155, and the draft Occupational Safety and Health Act, 2003.



Human Resource Development

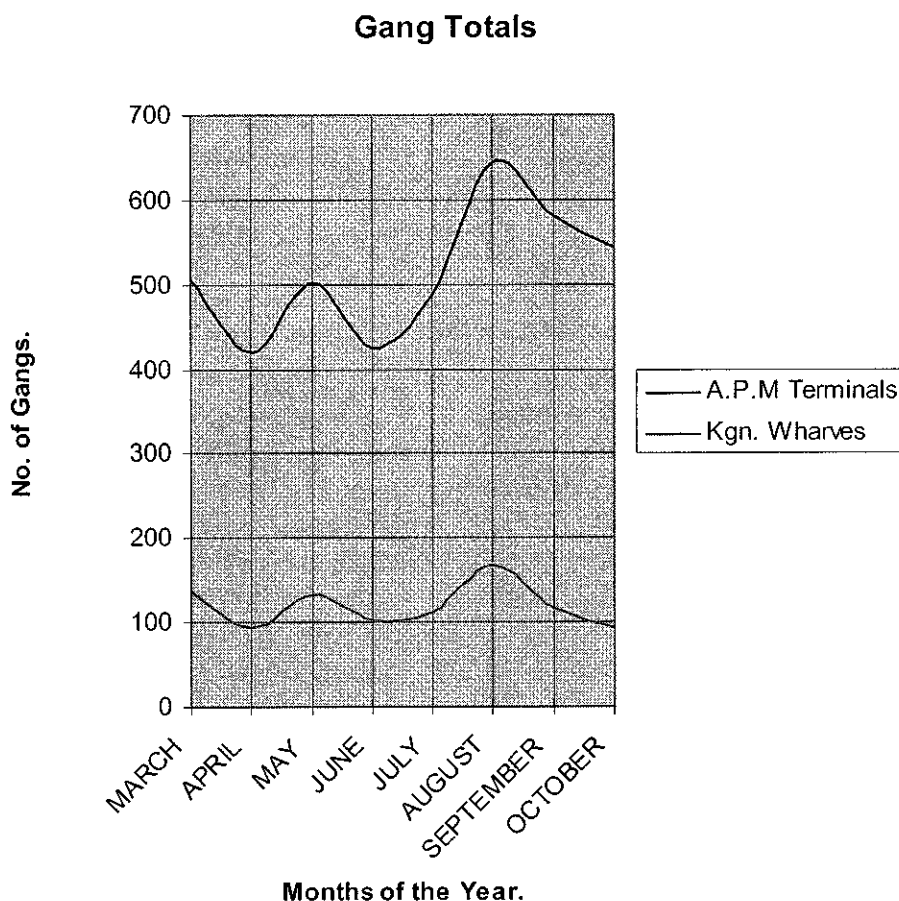
The JIC group also presented recommendations relating to the Draft Act. No official response has been received from the Ministry of Labour regarding the submissions. Further dialogue will be pursued with the Ministry on the matter with the view that the final draft will incorporate these recommendations.

Accidents

Year to Date there have been 48 injuries on the job involving stevedores. Most of these accidents resulted in musculo-skeletal injury.

While the current figure of 48 shows a reduction in the rate of accidents for 2005 when compared with 59 accidents taking place over the same period for 2004, the level of accidents taking place at the worksite remains at a high rate.

A number of safety and other precautionary signs were placed at the Recruiting Centre as well as on the Container Terminal in December 2004. Management has also proposed to the Joint Industrial Council that a Safety Subcommittee be



mandated to address issues of safety at the workplace.

A draft document outlining recommendations for safe work practices and conditions has been presented to JIC for discussion and ratification.

Discipline

There has been a significant reduction in the number of reported infringements in disciplinary matters with practically all reported cases being resolved at the departmental level. Most reported cases speak to lateness, absence from workstation, and early quitting.

Training & Development

Over the period, the Association embarked upon an intensive training programme where stevedores have been trained in the areas of Straddle Carrier Op-

Utilisation of SAJ Workers At the Port 2002-2005

Year To Date	KCT Vessels	KCT Gangs	KW Vessels	KW Gangs
Jan-Oct 2005	1322	3769	424	1990
Jan-Oct 2004	1450	3655	551	1187
Jan-Oct 2003	1438	3250	597	1223
Jan-Oct 2002	1211	3028	636	1308

Human Resource Development

erators, Quay Gantry Crane Operators, and Equipment Operators, which are APM categories.

Stevedores have therefore become multi-skilled and are currently working in these categories on a regular basis. Stevedores have also been retrained in Container Lashing, while several persons were trained as Winch and Forklift Operators.

Stevedore Certification

In addition, the SAJ has embarked upon the development of a Certification Programme for the Stevedore category.

This project is being spearheaded by HEART's National Vocational Training Department (NVQ), and a Technical Team consisting of representatives from the SAJ, HEART NTA, CMI, and NCTVET has recently completed the competency standards for Level 1 of the programme.

The Team is currently working on Level 2, which is expected to be ready by January 2006.

Train the Trainer

In an effort to build a complement of staff who could eventu-

ally assist with the stevedore training, the decision was taken to send three staff members on the Level I Train the Trainer programme conducted by HEART.

The staff members selected are familiar with port operations and the standards required in the stevedoring category.

In addition to developing Trainers, the Association will also seek to have staff members trained as Assessors to further enhance our training capability.



As part of its efforts to ensure compliance with ISPS and the US Maritime Security Act, representatives of US Coast Guard conduct periodic audits of security systems and procedures in partner ports. Here SAJ Operations Manager, Trevor Gordon, (second left) gives a tour of the Canine Division to the US Customs officers. He is accompanied by APM General Manager Peter Ford (second right) and other representatives of the Terminal.

Human Resource Development

The Canine Division

The Canine Service continues to be a viable source of income for the SAJ, and a very useful source of added confidence for Jamaican exporters. The Service completed a total of 1,453 assignments over the period.

There are 17 dogs and 10 Handlers in the system. Four newly trained young dogs will eventually replace several of the older dogs. One of the dogs has produced a litter of 10 pups and an additional two new pups were also recently acquired.

Education Assistance

For the 2005/2006 academic year, over 500 applications for educational grants were submitted to the SAJ Educational Assistance Fund.

Grants were given in the form of assistance with school fees or with purchasing schoolbooks; 380 applicants received assistance totaling \$2.4m, which resulted in underutilization of the Fund in terms of the total amount granted when compared with the amount budgeted for 2005.



The Shipping Association of Jamaica is committed to providing a highly trained and skilled workforce that is conscious of its critical role in the continued development of the Port of Kingston. The SAJ is committed to working with the Unions to ensure that there is a clear understanding on both sides of the value of the partnership between management and labour.

Port Computer Services Limited

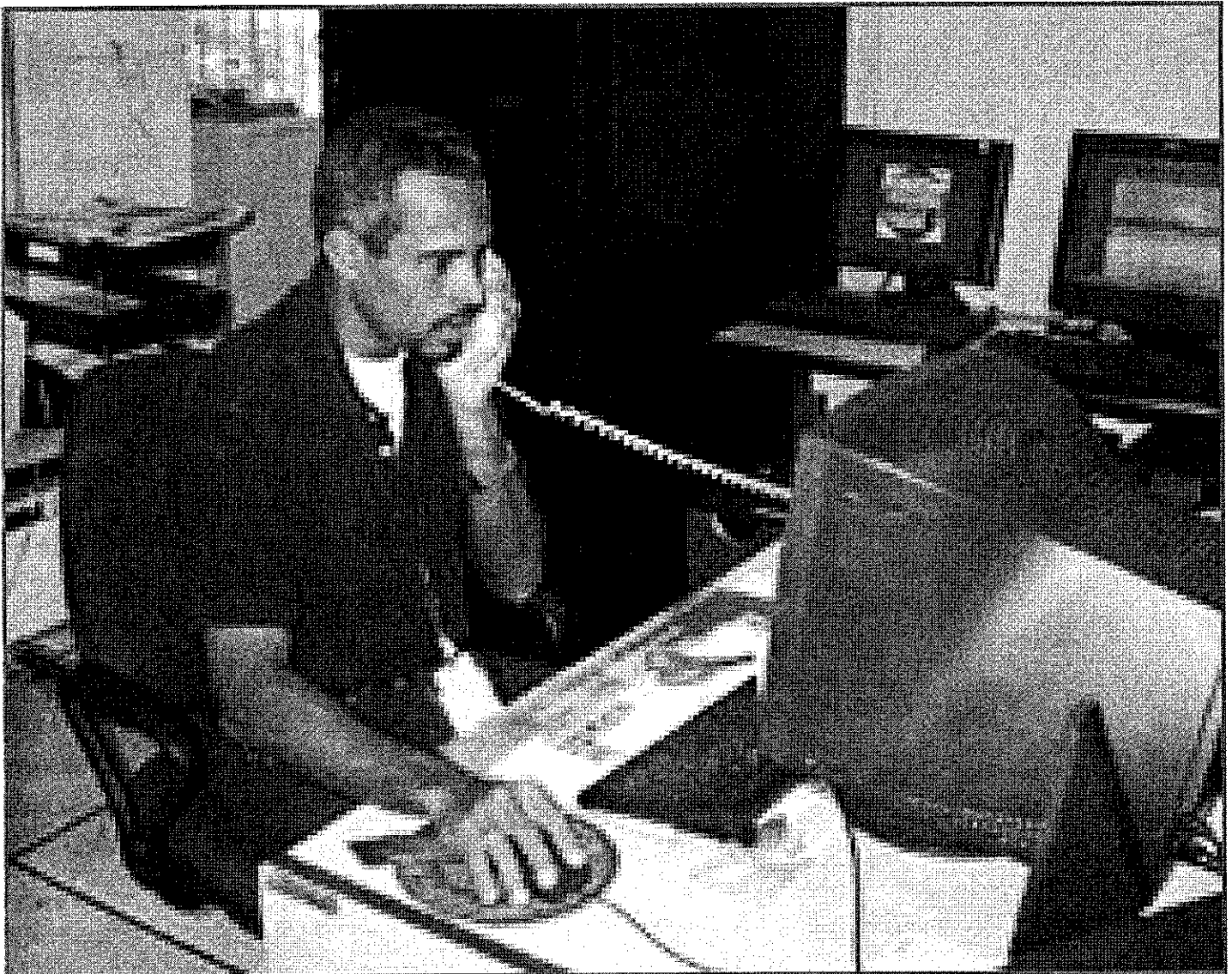
The company's profitability improved by 40% for the year 2005 compared to last year. We were able to achieve this in spite of the increasing competition in the IT industry and as customers seek to extract more value from their operating expenditure.

Pre-tax profit is \$14M compared

to \$10.2M for the same period last year. Revenues at the end of October 2005 decreased slightly from \$64M to \$63.8 when compared to the same period last year. Expenses decreased by 7.4%.

During the period under review the company had the following accomplishments:

- Acquisition and implementation of a new state-of-the-art i5 As400 server to support the operations of APM Terminals Limited.
- Implementation of a two to one real-time data replication service using MIMIX high availability solution for Kingston Wharves Limited and



Port Computer Services Limited

APM Jamaica Ltd. This facility will allow both companies to access their IT systems from a backup site in case of a disaster.

- Implementation of the Agis agency information system at two of Kingston's leading Shipping Agencies.
- Web enabling Kingston Wharves' Collection System to allow online query of charges as a precursor to allowing e-commerce transactions.
- Refurbishing of several payroll applications to increase user-friendliness.

FINANCIALS

For the period January to October 2005, PCS is reporting a net profit of \$14,076,203. Turnover for the period was \$63,828,551. Total YTD expenses were \$49,752,348.

Fixed assets acquired during the period amounted to \$16,494,801 while repayment of long-term liabilities was NIL.

MARKETING

The company completed two systems development projects during the period under review. The company completed the implementation of a modified version of the Agis application for a local shipping agent. We are in advanced discussions with a new entity on the port of Kingston to provide software to run their operations.

EQUIPMENT AND COMMUNICATION

The following equipment was acquired:

1. i5 As400 high end server.
2. Cisco Gigabit Routing Switch and Auxiliary Switches.

STAFF MATTERS

Two staff members that the company sponsored to pursue their Msc. in Information Technology at the UWI Mona were awarded their degrees this year. They are Donna-Marie Anderson and O'Niel Charles. The Company is proud of them. Staff members attended Disaster Recovery Training and networking training courses in order to keep our knowledge base current. Two staff members also attend the Jamaica Computer Society's Biztech conference.

Year To Date October 2005:		
	YTD 2005	YTD 2004
Profit/(Loss)	14,076,203	10,201,698
Income	63,828,551	64,071,109
Expenditure	49,752,348	53,869,410

NOTES

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NOTES

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"You may also note that, primarily in response to the manning needs of the transshipment business, we have had to increase the number of portworkers from 178 at the time the MOU was signed, to the current level of 223.

Our conservative forecast is that we will need to employ at least another 100 men by April 2006 in response to the demands of this growing business..."



the shipping association of jamaica

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