



# CIATTI

GLOBAL WINE & GRAPE BROKERS

---

## GLOBAL MARKET UPDATE – DECEMBER 2013

### VOLUME 4 ISSUE NO. 12

---

The bulk wine market continues moving at a moderate pace, as we head towards the end of the year. Activity has been strong in France, as buyers have come out of the starting gate at a brisk pace. The 2013 vintage is proving to be larger than the historically low 2012 crop, and buyers are competing for varietals across the board. With regards to pricing, France appears to be the one market that is currently experiencing pricing moving in an upward direction. California buyers are picking their contract lots, and export activity has increased, as prices have become more attractive for buyers in Europe and Asia.

Producers in the Southern Hemisphere are busy preparing for the 2014 vintage, and projections are for good crops in most markets. The business climate in Argentina remains difficult, and pricing in the bulk market is beginning to reflect projections for a difficult time ahead. Frost damage in Australia has been a concern, but most continue to believe that the crop will be of good size.

The market appears to have stabilized, but the full effect of the large crops in Spain and California are yet to be felt. Predictions vary as to the direction of pricing, but most feel that any downward pricing movement will be gradual and limited.



## ARGENTINA – DECEMBER 2013



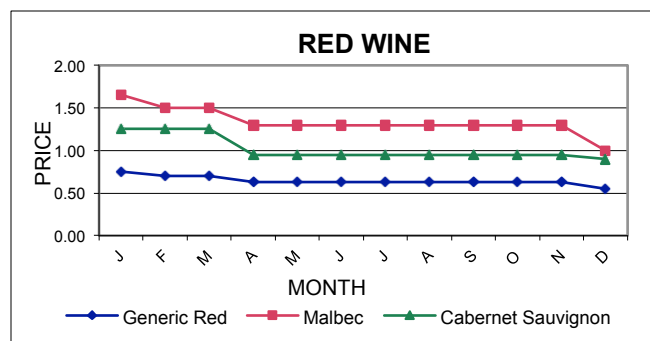
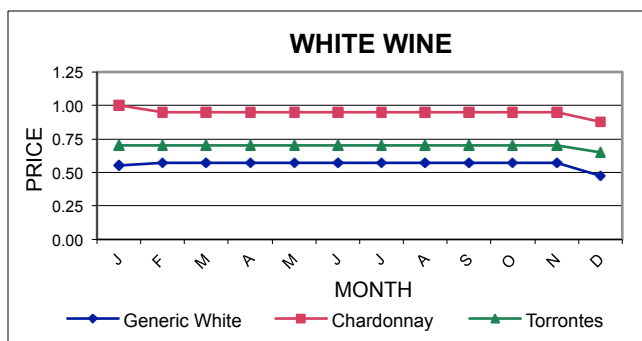
After the negative election results, the government reacted by making changes to some of the main Ministers. However, the situation looks to be headed in the same direction as before. This makes the scenario worse for business than before. Argentina is experiencing a significant drop in export sales for both wine and concentrate. This leaves significant volumes of good quality wines in stock. Domestically, there are few buyers looking for bulk wine, and the few buyers out there are offering very cheap prices. Considering the current situation, there are many bulk wine suppliers that are open to dropping prices in desperation for income and financial assistance for the coming harvest.

### CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FCA WINERY:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.45 – 0.50	↓	2013	Generic Red	0.50 – 0.60	↓
2013	Generic White (Criolla)	0.40 – 0.45	↓	2013	Cabernet Sauvignon	0.85 – 0.95	↓
2013	Chardonnay	0.85 – 0.90	↓	2013	Malbec	0.90 – 1.10	↓
2013	Torrontes	0.60 – 0.70	↓	2013	Malbec Reserva	1.10 – 1.50	↓
2013	Chenin Blanc	0.55 – 0.65	↓	2013	Syrah / Merlot	0.80 – 0.90	↓
2013	Muscat	0.55 – 0.65	↓	2013	Bonarda / Tempranillo	0.70 – 0.80	↓

### BULK PRICING OVER TIME



### BITS AND PIECES

Weather conditions have been stable and are becoming warmer every day. It looks like Argentina will have a hot summer ahead. There were almost no problems with frost (only Chardonnay), so the upcoming harvest is expected to be good.

Everyone awaits the INV 2014 crush forecast, which will be available by the end of December.

All prices have the tendency to drop, depending on the volumes and offers made.

## AUSTRALIA & NEW ZEALAND – DECEMBER 2013

TIME ON  
TARGET

Australia leads into the new vintage, as many are expecting to begin crushing for sparkling base in approximately six weeks. Frosts have been the recent topic of concern for a number of grape-growing areas. However, the earlier part of the year has provided excellent growing conditions. Many concur that Australia's 2014 vintage is predicted to be large in size, possibly larger than the 1.83 million tonne crush in 2013. There is little doubt that a percentage of grapes will be left on the vine, as some growers and suppliers look

to cut back on their intake. However, Australia will still be in a surplus position. Overall, 2013 SEA Pinot Gris and 2012-2013 Barossa Shiraz are still the most popular requests.

### CURRENT MARKET PRICING

ALL PRICING IN AUD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
NV	Dry White	0.50 – 0.70	↔	NV	Dry Red	0.70 – 0.80	↔
2013	Chardonnay	0.50 – 0.70	↓	2013	Cabernet Sauvignon	0.90 – 1.15	↔
2013	Sauvignon Blanc	0.80 – 0.95	↔	2013	Merlot	0.80 – 1.00	↓
2013	NZ Marlborough SB	NZ 4.50 – 5.20	↔	2013	Shiraz	0.90 – 1.15	↔
2013	Pinot Gris	0.95 – 1.20	↔	2013	Muscat	0.70 – 0.90	↔

### BITS AND PIECES – AUSTRALIA

Recent export figures suggest that the volume of Australian wine has decreased by 3% to 684 million liters, whereas the value of wine has increased slightly by 0.4% to \$2.61 per liter, or \$1.78 billion. The decrease in volume was characterized by a decline in red wine exports versus an increase in white wine exports (red down 9%, whites up 5%). *Wine Australia* reports this reduction in red wine may partially be due to declining stocks of vintage 2012 material. Bulk shipments now account for 54% of all wine exported out of Australia, with this figure slowly increasing each year.

### BITS AND PIECES – NEW ZEALAND

New Zealand food and wine exporters are expected to gain tens of millions of dollars with a new trade deal now in place with Taiwan. Under the agreement, tariffs will be removed from milk powder, cheese, butter, apple, cherry and wine exports to Taiwan.

New Zealand aims to be the world's leading producer of high quality, low calorie and low alcohol lifestyle wines, thanks to a new world-leading research program facilitated by a Primary Growth Partnership (PGP) between the wine industry and the Ministry for Primary Industries. The program is the largest research and development project undertaken by New Zealand's wine industry and is designed to position New Zealand as number one in the world for premium lifestyle wines.

*Wine Spectator*, the American wine journal, has awarded global recognition to two Marlborough Pinot Noirs. Greywacke Pinot Noir 2011 and Astrolabe Pinot Noir 2010 ranked 48th and 60th respectively - the only New Zealand wines in the magazine's annual, internationally coveted Top 100 list.

## CALIFORNIA – DECEMBER 2013

TIME ON TARGET

Post crush 2013 begins the process of approval tastings for pre-harvest wine contracts, the hosting of international buyers searching for their annual needs and the early discussions about next year's crushing capacity and grape contract renewals. Suppliers are readying their wines for sale, while buyers assess their needs for the coming year. Inventories from 2012 and 2013 are available and samples are readily available for buyers.

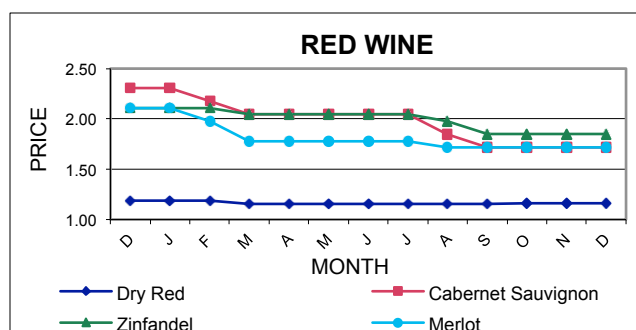
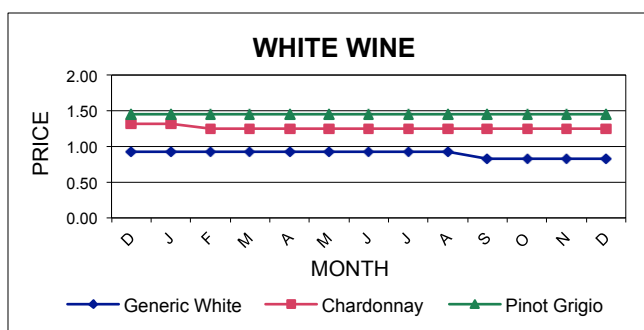
The California market will be very competitive for sellers in 2014, and prices will again settle from the extremes seen two years ago. Two back-to-back large harvests in California have changed the landscape, but questions loom about current drought conditions and water availability for agriculture around the state. There are continual reports of devastating vineyard issued for both old and new vineyards. It remains to be seen if and how these problems may decrease volumes in the 2014 growing season and beyond.

### CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.66 – 0.85	↓	2013	Generic Red	0.92 – 1.12	↓
2013	Chardonnay	1.05 – 1.32	↔	2013	Cabernet Sauvignon	1.32 – 1.72	↓
2013	Pinot Grigio	1.32 – 1.58	↔	2013	Merlot	1.19 – 1.45	↓
2013	Muscat	1.05 – 1.32	↓	2013	Pinot Noir	1.72 – 1.98	↔
2013	White Zinfandel	0.99 – 1.12	↓	2013	Syrah	1.19 – 1.45	↔
2013	Colombard	0.86 – 0.97	↓	2013	Zinfandel	1.32 – 1.85	↓

### BULK PRICING OVER TIME



### BITS AND PIECES

Reported sales data for the first nine months show volume advances of all wine categories into the US market are growing at only 2.1%. Domestic wines grew at less than 1%, while imported bottles sales grew at 6%. Export sales of bottled wines continue to grow at 11%, dominated by Gallo. Bulk wine exports of California wines are slow to rebound, but should trend upward given availability and better pricing.

As bulk wine imports decline, inventories of 2012 and 2013 California wines are replacing those supplies in many mid-priced labels. The majority of all wineries in California have shown some growth increases in 2013. This includes many premium wine brands that have struggled over the past years.

## CHILE – DECEMBER 2013

TIME ON  
TARGET

It is now spring in Chile and the weather has been very warm and sunny. Both the domestic and export markets have been slow, with small deals taking place on a consistent basis. Prices haven't yet been quoted for the 2014 vintage, but prices are expected to be lower than that of 2013.

### CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FOB PORT:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.60 – 0.70	↔	2013	Generic Red	0.50 – 0.55	↔
2013	Chardonnay	0.90 – 1.50	↑	2013	Cabernet Sauvignon (Basic)	0.57 – 0.63	↓
2013	Sauvignon Blanc	0.70 – 1.15	↔	2013	Cabernet Sauvignon (Standard)	0.65 – 0.85	↔
2013	Sauvignon Blanc (High Quality)	1.50 – 2.00	↔	2012	Cabernet Sauvignon (High Quality)	1.50 – 4.00	↔
2013	Pinot Noir	0.90 – 1.50	↑	2013	Merlot	0.65 – 0.90	↔
2013	Syrah	0.65 – 0.80	↔	2013	Malbec	0.90 – 2.00	↔
2013	Carmenere	0.60 – 0.80	↔	2013			

### EXPORT FIGURES

Wine export Figures (Bulk, Bottled & Sparkling)	January – October 2012			January – October 2013			Volume
	Million Liters	Million US \$ FOB	Average Price	Million Liters	Million US \$ FOB	Average Price	Variance %
Bottled	358.11	1,158.16	3.23	358.66	1,184.66	3.30	0.16
Bulk	189.40	213.38	1.13	358.10	310.94	0.87	89.08
Sparkling Wines	3.14	12.64	4.02	2.66	11.15	4.19	- 15.39
Packed Wines	23.78	46.27	1.95	22.43	44.63	1.99	- 5.66
Total	574.43	1,430.45	2.58	741.90	1,551.38	2.59	

### BITS AND PIECES

Chilean bulk wine exports show an increase (January to October 2013) compared to the same period last year. A total of 358.10 million liters were exported, or an increase of 89.08%. Bottled wines show an increase of 0.16% over last year, while sparkling and packed wines show a decrease of 15.39% and 5.66% respectively.

The Chilean Peso exchange rate reached CLP\$532 against the US Dollar, the highest rate seen in the last 25 months. The year 2013 started with an exchange rate of CLP\$479, dropped to its lowest point at CLP\$467, and has since increased to the current rate. The current exchange rate helps Chilean exporters, who experienced difficulties when the rate dropped below CLP\$500.

## FRANCE – DECEMBER 2013

TIME ON  
TARGET

French producers are currently working to finalize figures for the 2013 vintage, so exact numbers are not yet known. According to the latest estimations of the French government, the 2013 vintage will definitely be larger than the historically low 2012 vintage. Figures are looking to be anywhere between 42.35 and 43 million hectoliters.

November 2013 French Crop Size Estimations (in 1000 hl)					
	Average*	2012	2013	2012/2013	2013/Average*
AOP Wines	21,660	19,699	19,097	- 3%	- 12%
Wines for Brandy	7,625	7,583	7,449	- 2%	- 2%
IGP Wines	12,715	12,096	13,094	8%	3%
Other Wines	3,435	1,987	2,703	36%	- 21%
Total Wines	45,436	41,365	42,344	2%	- 7%

\* Average 2008-2012

Source: AGRESTE // French Customs

## CURRENT MARKET PRICING

BULK WINE PRICES: ALL PRICES IN € PER LITER; EXW:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White (VDF)	0.80 – 0.85	↑	2013	Generic Red (VDF)	0.65 – 0.70	↔
2013	Chardonnay (VDF)	0.92 – 0.95	↑	2013	Cabernet Sauvignon (VDF)	0.75 – 0.77	↑
2013	Chardonnay (IGP OC)	0.95 – 1.05	↔	2013	Cabernet-Sauvignon (IGP OC)	0.77 – 0.80	↑
2013	Sauvignon-Blanc (VDF)	0.84 – 0.90	↑	2013	Merlot (VDF)	0.73 – 0.77	↑
2013	Sauvignon-Blanc (IGP OC)	0.85 – 0.92	↑	2013	Merlot (IGP OC)	0.77 – 0.80	↑
2013	Generic Rosé (VDF)	0.75 – 0.77	↑	2013	Syrah (IGP OC)	0.75 – 0.77	↑
2013	Varietal Rosé (IGP OC)	0.80 – 0.90	↑	2013	Dry Muscat (IGP OC)	1.00 – 1.10	↑

\*\* These prices are estimations based on market prices at the end of the Vintage 2012 campaign

## BITS AND PIECES

In terms of market activity, Languedoc continues to lead after a fast buying campaign start. Recent activity has been seen on varietal white and varietal rose wines. Negotiants are quickly covering their needs, knowing that these categories will see the biggest pressure in the coming months.

Independent growers are currently the main target source, as they tend to agree to slightly lower prices than cooperatives, given quick loading terms. Cooperatives are selling the same amount in terms of volume, but at a slower pace, as they are still in the process of price negotiations with historical buyers. Market prices are still on an upward trend, because of the small crop in other French regions.

Due to the late harvest that caused 3-week delays, the buying campaign has only just begun for red wines, as most malolactic fermentations have just finished and winemakers are now blending wines. The final 2012 vintage batches are being quickly purchased by negociants, in order to have enough stock of cost-reducers. Due to the small harvest in Bordeaux and Cotes du Rhone, inter-regional transactions for Vin de France red wines (generic and varietal) are expected to be a crucial part of the 2013 vintage. In these regions, limited availability of AOP wines has caused a huge increase in demand and pressure on the market, with small capacity to develop prospects for export markets.

## GERMANY – DECEMBER 2013



The 2013 crush tonnage in Germany is 9% less than the annual mean of the last ten years. This is the slowest time of year for the German wine business, which is especially true after the small crush numbers. Massive rainfalls during the first two weeks of October softened the skins of mid-late and late ripening grapes, due to enormous water deposits in the grapes. As a result, the skins ripped off and caused huge losses, especially for Riesling.

### CURRENT MARKET PRICING

BULK WINE PRICES: ALL PRICES IN EURO PER LITER EX WINERY:

Vintage	Variety	Price	Trend
2012	White Wine	1.05 – 1.15	↑
2012	Pinot Grigio	1.40 – 1.50	↔
2012	Riesling	1.20 – 1.50	↑
2012	Red Wine	0.65 – 0.80	↔
2012	Dornfelder	0.85 – 0.95	↔

### BITS AND PIECES

The table below shows projections for the 2013 grape harvest as of the end of October 2013. As shown, there are variations between the different German growing regions, indicating an enviable harvest. In Rheingessen, the largest growing area, the crop size was average compared to last year. The last column shows the variation of the 2013 vintage compared to the average over the last ten years, in which Mosel shows a 25% drop.

Projection of 2013 Grape Harvest			
Growing Region	Juice in 1,000 hl	% variation 2012 to 2013	% variation to 10 year average
Baden	1,000	- 14	- 21
Franken	470	+/- 0	+ 6
Mosel	670	+/- 0	- 25
Nahe	290	- 6	- 15
Pfalz	2,100	- 11	- 6
Rheingau	200	- 13	- 17
Rheinhessen	2,600	+/- 0	+ 1
Württemberg	925	- 19	- 18
Others	149	+/- 0	- 10
TOTAL	8,404	- 7	- 9

Source: German Wine Grower's Association

## ITALY – DECEMBER 2013



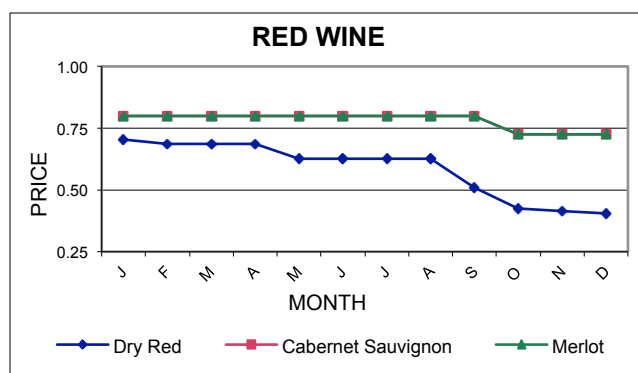
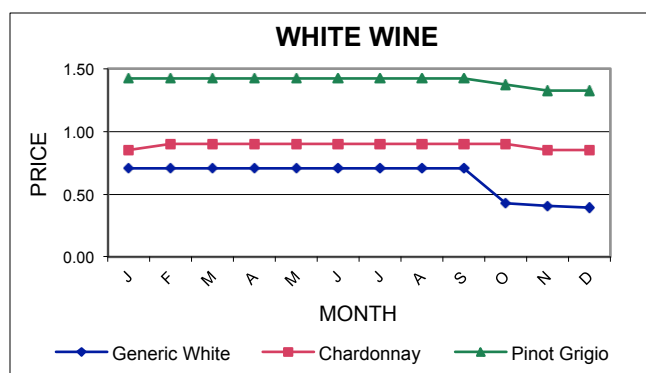
Currently, the Italian wine market seems to be moving at two different speeds: expensive varietal wines and entry-level generic wines. The most expensive categories include Prosecco (nearly 19 million liters bottled in November, prices 115-125€/hl), Pinot Grigio (120-140€/hl), Primitivo (95-110€/hl), Chianti and Montepulciano DOC Abruzzo. On the other hand, there are entry-level wines, such as generic red and generic white, which have seen another price drop of 5% in November.

### CURRENT MARKET PRICING

BULK WINE PRICES: ALL PRICES IN € PER LITER; EXW:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.35 – 0.43	↓	2013	Generic Red	0.38 – 0.43	↓
2013	Chardonnay	0.80 – 0.90	↓	2013	Cabernet Sauvignon	0.70 – 0.75	↔
2013	Pinot Grigio	1.25 – 1.40	↑	2013	Merlot	0.70 – 0.75	↔

### BULK PRICING OVER TIME



### BITS AND PIECES

The major bottling companies in Italy purchase product on a weekly basis, knowing that they may see cheaper prices in January with quick loading. The market is expected to settle in January. The most aggressive quotes are currently around 3.2 €/hectograde in Southern Italy. Therefore, prices are still a bit higher than Spain.

The weather in South Central Italy has been very bad over the last few days. This has affected Marche, Abruzzo, Puglia and Calabria. The heavy rainfall has already caused some deaths, as it has affected main roads and rail connections.



## SOUTH AFRICA – DECEMBER 2013

TIME ON  
TARGET

2013 has been a very positive year for the South African wine industry. Stock levels are the lowest seen in many years. Bulk exports persisted during the year, due to competitive pricing, good quality wines, the smaller 2012 crops in Europe and a very favorable exchange rate against all major currencies.

### CURRENT MARKET PRICING

ALL PRICING IN SA RAND PER LITER; FOB, CAPE TOWN:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	4.50 – 4.75	↔	2013	Generic Red	5.80 – 6.30	↔
2013	Chardonnay	5.95 – 7.25	↔	2013	Cabernet Sauvignon	6.80 – 8.00	↔
2013	Sauvignon Blanc	5.95 – 7.80	↔	2013	Ruby Cabernet	5.85 – 6.30	↔
2013	Generic Rosé	4.75 – 6.00	↔	2013	Merlot	6.80 – 8.00	↔
2013	Cultivar Rosé	5.50 – 6.00	↔	2013	Pinotage	6.80 – 7.50	↔
2013	Chenin Blanc	4.60 – 5.10	↔	2013	Shiraz	6.80 – 8.25	↔
2013	Muscat	4.90 – 5.20	↔	2013	Cinsaut	5.85 – 6.30	↔

### BITS AND PIECES

#### Domestic Market:

- As per previous reports, there are very a little stocks available for white wine exports, generic and varietal wines and generic rosé.
- Red wine sales have been more stable. Some varietals, such as Pinotage and Shiraz, are still available on the market. There are still volumes of red wine available.
- Domestic sales have increased monthly over last year, with growing sales in the entry-level market.
- Most wineries and winery-related businesses will be closed or working with skeleton crews from 16 December to 6 January.

#### Export Market:

- As previously mentioned, the 2013 vintage has been a very good year for South African wine exports, especially for white and generic rosé wines. This trend has slowed down over the last 2 months.
- Reports show that EU countries harvested 11% or 1,800 million liters more in 2013 than in 2012. This is compared to the total South African production of just over 1,000 million liters.
- Bottled and packaged wines also showed good growth during 2013, mainly because of a favorable exchange rate. Some buyers and companies are going back to packaging the wine closer to the source.
- Some of the bigger buyers are already looking at procuring and contracting their early 2014 needs.
- Harvest is looking good and will start in most areas around mid- to end of January. Some buyers would like to start exporting fresh 2014 wine by mid-April.

## SPAIN – DECEMBER 2013

TIME ON TARGET

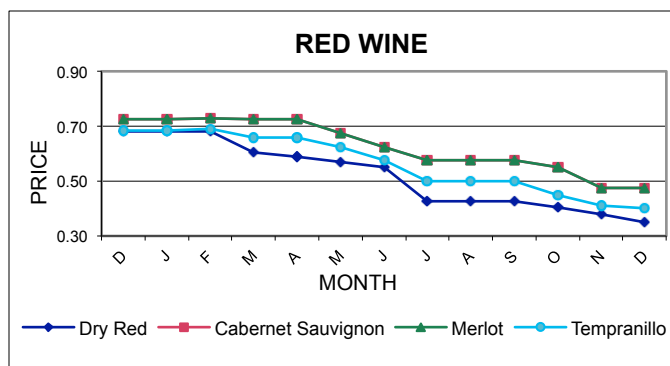
The 2013 Spanish crop size is still not yet known. Estimates for a historical crop size between 46 and 48 million hectoliters are impacting the buying campaign in different ways. The increase in volume comes mainly from the biggest producing region Castilla La Mancha, as other regions (Navarra & Valencia) are reporting a normal to smaller crop than last year. The quality of the 2013 vintage looks to be varied, with some higher quality wines, but also a lot of low quality wines (low alcohol, high acidity, low color on reds, lack of flavors).

### CURRENT MARKET PRICING

BULK WINE PRICES: ALL PRICES IN € PER LITER; EXW:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.30 – 0.40	↓	2013	Generic Red	0.30 – 0.40	↓
2013	Generic Rosé	0.34 – 0.38	↓	2013	Cabernet Sauvignon	0.45 – 0.50	↔
2013	Moscatel	0.60 – 0.70	↔	2013	Merlot	0.45 – 0.50	↔
2013	Syrah	0.43 – 0.58	↓	2013	Tempranillo	0.38 – 0.42	↓

### BULK PRICING OVER TIME



### BITS AND PIECES

Market pricing has seen an uninterrupted decrease, compared to the same period last year (for a very small 2012 crop). By the end of November after the Amsterdam Bulk Wine Fair, the latest impressions were that the market price for quality wines was stabilizing, with limited room for further price negotiation. Conversely, very low entry-level wines (for distillation or industrial use) could be found at any price, as volumes are huge and negotiation power is in the buyer's hands.

Even though the attractive pricing hasn't caused a huge sales flow on the buying side, it seems that all of Spain's historical buyers (France, Germany, Russia) have set-up strategies to return to Spanish supply (especially for European blends). These buyers are merely waiting for prices to reach a certain range before committing on mid-term needs.

## BUYER'S CORNER: CANADA DECEMBER 2013

The Canadian Wine industry is made up of roughly 500 grape-based wineries, with more than 1,700 growers spread out over approximately 27,500 acres of vineyards. Wine is produced in six provinces: Ontario being the largest, followed by British Columbia, Quebec, Nova Scotia, New Brunswick and P.E.I. Per capita wine consumption in Canada in 2011 was measured at 16.5 liters, compared to beer at 80.3 liters and spirits at 7.4 liters.

The Canadian wine industry produces its own "appellation" wines from 100% Canadian grapes, which are classified as VQA (Vintners Quality Alliance). Strict regulations are enforced to assure that standards are met. The Canadian wine industry also has the ability to blend Canadian content with import bulk wine: Cellared In Canada (CIC) or International Canadian Blend (ICB). In the province of Ontario, the LCBO (Liquor Control board of Ontario) allows import wine to be blended into 30% domestic content (percentage does change on occasion). In British Columbia, local content does not have to be present in the CIC or ICB blend.

Canada is one of the top producers of Icewine in the world. Strict standards must be met in accordance with VQA regulations as follows:

- Must be produced exclusively from grapes
- Harvested naturally frozen from the vine at minimum of – 8 C
- Juice pressed must achieve a minimum of 35 brix
- Vidal is the only hybrid grape allowed.

### LCBO Key Trends 2011-2012

2011-2012 wine net sales were CDN\$1.244 billion, up 4.4% from the year prior. Wine consumers are returning to historic buying patterns and trading up in price. Value wines (< CDN\$8/bottle) saw the largest decline (down 3%)

Wines in the \$12-\$14.95 range increased by 12.1%:

- Total Ontario (ICB and VQA) was up by 5.7%
- Italian Pinot Grigio was up 12.7%
- Prosecco increased 23.5%
- French south red blends were up 25.4%
- French white blends were up 94.7%
- New Zealand increased 25.5%

#### OUTLOOK

- Net sales to increase by 4.4% or 1.2 billion dollars
- Sales of <\$10 per bottle will continue to decline, as consumers become more focused on \$10-\$15 per bottle range.
- Ontario wines to grow by 4.6%
- New World wines forecasted to grow by 5.3%. California should lead the way with their popular cabernets and blends.
- Muscat will see demand increases

**Canadian Imports of Wine – Top 10 Markets in 2012**

	Value CND\$	Quantity
1. France	437,658,177	61,516,212
2. Italy	394,576,109	72,029,248
3. United States	374,343,754	56,078,893
4. Australia	237,724,126	49,505,880
5. Argentina	106,263,502	27,339,109
6. Spain	101,564,869	38,336,380
7. Chile	98,870,062	24,187,938
8. New Zealand	70,954,196	7,712,644
9. South Africa	49,615,794	20,591,554
10. Portugal	49,165,678	8,213,008
<b>Total Top 10 Markets</b>	<b>1,920,736,267</b>	<b>365,510,866</b>
<b>Total All Markets</b>	<b>1,973,902,904</b>	<b>376,786,880</b>



# CIATTI

GLOBAL WINE & GRAPE BROKERS

---

## CONTACTS

---

### ARGENTINA

Eduardo Conill  
T. +54 261 420 3434  
Email: [eduardo@ciatti.com.ar](mailto:eduardo@ciatti.com.ar)

### AUSTRALIA/NEW ZEALAND

Matt Tydeman  
Simone George  
T. +61 8 8361 9600  
Email: [Matt@ciatti.com.au](mailto:Matt@ciatti.com.au)  
Email: [simone@ciatti.com.au](mailto:simone@ciatti.com.au)

### CALIFORNIA – IMPORT / EXPORT

CEO - Greg Livengood  
Steve Dorfman  
T. +415 458-5150  
Email: [greg@ciatti.com](mailto:greg@ciatti.com)  
Email: [steve@ciatti.com](mailto:steve@ciatti.com)

### CALIFORNIA – DOMESTIC

T +415 458-5150  
John Ciatti – [john@ciatti.com](mailto:john@ciatti.com)  
Glenn Proctor – [glenn@ciatii.com](mailto:glenn@ciatii.com)  
John White – [johnw@ciatti.com](mailto:johnw@ciatti.com)  
Chris Welch – [chris@ciatti.com](mailto:chris@ciatti.com)

### CONCENTRATE

Greg MaGill  
T. 559 977 4040  
[gregm@ciatti.com](mailto:gregm@ciatti.com)

### CANADA & US CLIENTS OUTSIDE OF CALIFORNIA

Dennis Schrapp  
T. 905/354-7878  
Email: [dennis@ciatticanada.com](mailto:dennis@ciatticanada.com)

### CHILE

Marco Adam  
T. +56 2 363 9206 or  
T. +56 2 363 9207  
Email: [madam@ciattichile.cl](mailto:madam@ciattichile.cl)

### CHINA/ASIA PACIFIC

Simone George  
T. +61 8 8361 9600  
Email: [simone@ciatti.com.au](mailto:simone@ciatti.com.au)

### FRANCE/ITALY

Florian Ceschi  
T. +33 4 67 913532  
Email: [Florian@ciatti.fr](mailto:Florian@ciatti.fr)

### GERMANY

Christian Jungbluth  
T. +49 6531 9734 555  
Email: [christian@ciatti.biz](mailto:christian@ciatti.biz)

### SPAIN

Nicolas Pacouil  
T. +33 4 67 913531  
Email: [nicolas@ciatti.fr](mailto:nicolas@ciatti.fr)

### UK / SCANDANAVIA / HOLLAND

Catherine Mendoza  
T. +33 4 67 913533  
Email: [catherine@ciatti.fr](mailto:catherine@ciatti.fr)

### SOUTH AFRICA

Vic Gentis  
T. +27 21 880 2515  
Email: [vic@ciatti.fr](mailto:vic@ciatti.fr)  
-or-  
Petre Morkel  
T. +27 82 33 88 123  
Email: [petre@ciatti.co.za](mailto:petre@ciatti.co.za)