



# CIATTI

GLOBAL WINE & GRAPE BROKERS

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## GLOBAL MARKET UPDATE – SEPTEMBER 2013 VOLUME 4 ISSUE NO. 9

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As the calendar flips to September, activity is high in the bulk market. Falling prices in the Southern Hemisphere have caused many fence-sitting buyers to make commitments. Chilean suppliers are quickly closing contracts, as bulk pricing looks unstable and inventory looks to be headed to a long position. Argentine producers are still fighting against a difficult economy, as inflation continues to cause a series of problems in the wine business. Australian and South African markets remain active. Reports of favorable growing conditions in Australia are causing concern over a potential future oversupply.

In the North, California crop estimates continue to be strong, as many believe that the harvest will approach the record number of 2012, but not quite equal it. Overall, the bulk market has plenty of supply across all regions. Some varietals still command strong prices, while others seem to be headed for close out type pricing. Buyers are taking advantage of the many opportunities now in the market and all sides hope that the result of reduced bulk pricing will mean greater sales at the retail level.



## CONCENTRATE – SEPTEMBER 2013

The Grape Juice Concentrate harvest in California is now in full swing for White Grape Juice Concentrate and only a few weeks away from production for Red Grape Juice Concentrate. WGJC production for the 2013 harvest could be up more than 20% over last year, with an abundance of high quality fruit. Both raisin and winery demand are lower than last year. This has helped relax pricing ranges to both fruit beverage processors and wineries.

The Rubi Red harvest looks to be substantial this year. While we are still a few weeks away from harvest, bunch counts and initial sugar and color measurements are much improved from last year. There may be some downward price adjustments this year, but overall demand for this product is still strong and a surplus is not likely.

### Europe:

Indicators out of Spain and Italy show a much better crop for both generic white and red GJC grapes. Processors will have product to sell, but the delayed harvest has pricing still in question. With production being up this season, this should allow pricing to decrease. It has been said that the crop is expected to be a minimum of 20% higher this year and that pricing will drop by 10-15% over the highs of last year. There is still strong demand in Europe and in the Eastern block countries for GJC so we expect limited imports coming to the United States.

### Argentina:

Current pricing for White Grape Juice Concentrate landing in the United States has dropped below \$10.00 per gallon CIF port East and West coasts.

### Chile:

Red Grape Juice Concentrate is still available in Chile with hi color concentrate in the 2000-4000+ spectrum being offered.

## CURRENT MARKET PRICING

ALL PRICING IN USD PER US GALLON; FCA WINERY:

RED GRAPE JUICE CONCENTRATE		
Country	Price	Trend
California (1000)	14.00 – 15.00	↓
Chile (600)*	14.00 – 15.00	↔
Chile (1000)*	15.00 – 16.00	↓

\* Only very limited volumes are currently available

WHITE GRAPE JUICE CONCENTRATE		
Country	Price	Trend
Argentina	9.00 – 9.50	↓
California	11.00 – 12.50	↓

APPLE JUICE CONCENTRATE		
Country	Price	Trend
China	7.50 – 8.00	↔
US	8.00 – 9.00	↓

## ARGENTINA – SEPTEMBER 2013

TIME ON TARGET

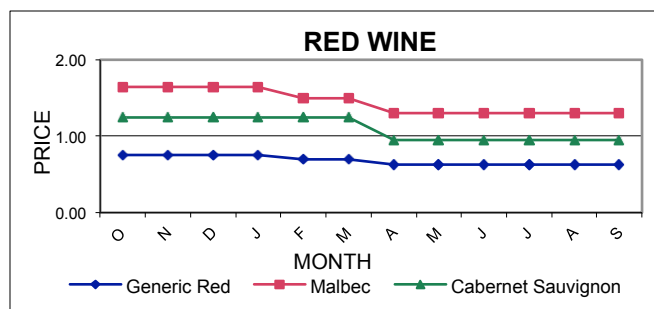
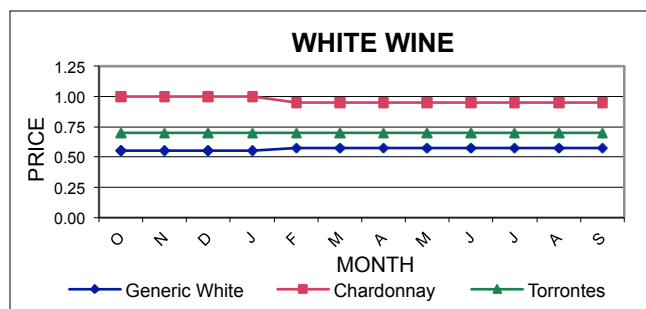
Due to its current situation both domestically and internationally, the wine business in Argentina remains in crisis. There are volumes currently available for all wines, but few buyers are showing interest. Local economic conditions remain complicated due to inflation, recession and other financial problems. Many buyers who have previously paid high prices for grapes in a normal year have not yet committed this year. Meanwhile, international buyers are looking elsewhere for large volume and low prices, particularly in Chile, Australia and South Africa.

### CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FCA WINERY:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.55 – 0.60	↓	2012	Generic Red	0.60 – 0.65	↓
2012	Generic White (Criolla)	0.50 – 0.55	↓	2012	Cabernet Sauvignon	0.90 – 1.00	↓
2012	Chardonnay	0.90 – 1.00	↓	2012	Malbec	1.20 – 1.40	↓
2012	Torrontes	0.65 – 0.75	↓	2012	Malbec Reserva	1.60 – 1.80	↓
2012	Chenin Blanc	0.65 – 0.75	↓	2012	Syrah / Merlot	0.90 – 1.00	↓
2012	Muscat	0.65 – 0.75	↓	2012	Bonarda / Tempranillo	0.85 – 0.95	↓

### BULK PRICING OVER TIME



### BITS AND PIECES

Once again, exports have seen a significant drop during the month of July, driven by bulk wine and White Grape Juice Concentrate, for a total export volume of 209.9 million liters from January to July 2013.

Activity on the domestic bulk wine market also continues to be very slow, which is not likely to change until the economic and financial crisis in Argentina sees some changes first.

Prices remain as they were last month, showing a downward tendency.

## AUSTRALIA & NEW ZEALAND – SEPTEMBER 2013

TIME ON  
TARGET

Good winter rains across the main grape growing regions of Australia are already looking to set the foundations for a good 2014 crop. With Australian commercial suppliers presently housing good levels of inventories, another similar vintage may not be the answer the Aussie wine industry is looking for. Bud burst has commenced in South Australia, with some warmer weather expected for the start of spring.

In New Zealand, a 6.6 magnitude earthquake has rocked Marlborough's main town of Seddon. The earthquake has caused some minor damage to wineries in the area, mainly with storage tanks rupturing from the movement. Only a small quantity of wine has been lost, but no lives were taken. The main earthquake was followed by several aftershocks of up to 5.4 magnitude.

### 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	0.60 – 0.80	↓	2013	Cabernet Sauvignon	0.95 – 1.20	↓
2013	Sauvignon Blanc	0.80 – 0.95	↔	2013	Merlot	0.95 – 1.15	↓
2013	NZ Marlborough SB	NZ 4.50 – 5.50	↔	2013	Shiraz	0.95 – 1.20	↓
2013	Pinot Gris	0.95 – 1.20	↔	2013	Muscat	0.75 – 0.90	↓

### BITS AND PIECES – AUSTRALIA

Treasury Wine Estate revealed a 52.9% drop in profit, down to \$42.3 million for the financial year. Treasury's CEO David Dearie, does not expect the company to become more susceptible to a takeover and is committed to continuing sales in the US, even with their recent dumping of \$33 million worth of stock (the equivalent to 500,000 – 600,000 cases). While growth was still positive in many countries such as Asia, Europe, Africa and Australia, the US has caused the company financial woes.

There has been some reprieve over the last few months with the Australian dollar dropping against the USD, as shown to the right:

2013	USD Low	USD High
March	1.019	1.048
April	1.027	1.054
May	0.963	1.031
June	0.913	0.976
July	0.894	0.925
August	0.890	0.919

### BITS AND PIECES – NEW ZEALAND

Exports of New Zealand wine to have increased by 3% in value, rising to a total of NZD \$1.21 billion over the last financial year. The volume of NZ wines has declined by approximately 5%, mainly thought to be the result of the short volume availability from the 2012 vintage. The New Zealand Winegrowers body felt the increase in availability of material from the current vintage would ensure more volume would be shipped offshore. The US and Canada are two of the increasing NZ wine consuming countries, with the US increasing by 13% to a total of \$284m and Canada by 10% to \$78m.

- \$1.2 billion exported, to 80 countries, New Zealand's 8th biggest goods export
- Largest horticultural export by value
- Export values up 22% since 2009
- 84.5% of wine exported is Sauvignon Blanc
- Average price in Australia for NZ wine is A\$13.04 a bottle
- Average price in the UK for NZ wine is £6.70 a bottle

Source: Fairfax NZ News

## CALIFORNIA – SEPTEMBER 2013

TIME ON TARGET

The 2013 harvest is moving along at full speed. Pre-harvest projections are being met or exceeded on most early varieties. Chardonnay, Pinot Noir, Sauvignon Blanc and Pinot Grigio have had average to above average yields in the Central Valley. Other heavy red grapes are starting to be crushed and are expected to be average plus with good color.

### Coastal region:

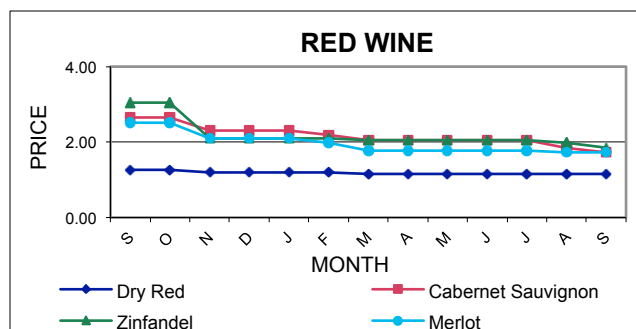
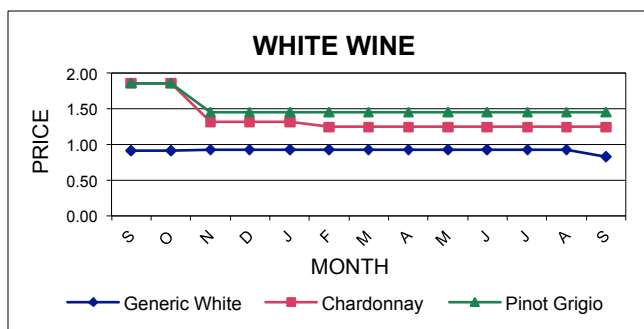
Early sparkling programs proved very large for almost all producers in the North Coast region. Look for all varieties in the North Coast to be above average. Timing of delivery of these grapes to wineries will prove critical. The Central Coast is just starting crush, but everyone is optimistic that both quality and volumes will be abundant.

## CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.73 – 0.92	↔	2012	Generic Red	0.99 – 1.32	↔
2012	Chardonnay	1.05 – 1.45	↓	2012	Cabernet Sauvignon	1.45 – 1.98	↓
2012	Pinot Grigio	1.32 – 1.58	↔	2012	Merlot	1.45 – 1.98	↓
2012	Muscat	1.05 – 1.32	↓	2012	Pinot Noir	1.98 – 2.38	↔
2012	White Zinfandel	1.03 – 1.12	↔	2012	Syrah	1.45 – 1.98	↔
2012	Colombard	0.86 – 1.06	↔	2012	Zinfandel	1.45 – 2.25	↓

## BULK PRICING OVER TIME



## BITS AND PIECES

Sales volumes for the first half of 2013 have just been released in the Gomberg Fredrikson Report, showing shipment gains on both domestic wines (+2%) and imported case goods (+8%). Bulk wine imports have declined (-23%), but still represent 27% of all imports. Bottled wine exports gained (+12%), led by Gallo, but bulk wine exports declined (-7%). The premium wine categories have continued to grow for both domestic and imported wines. This trend should continue for many established brands, along with new entries from large wineries and negociants. The recent large vintages of varietal grapes will help this growth.

California grape sales have continued, but are slowing, given capacity constraints and the growing potential that all varieties will be ready to harvest in a short window of time. To date, reports are for outstanding quality for the 2013 vintage.

## CHILE – SEPTEMBER 2013

TIME ON  
TARGET

Chilean producers have now started to offer at more aggressive prices. The domestic market has seen spot deals for small volumes of wine. The drought in northern Chile has created higher demand and lower offers for dry white wines. Meanwhile, the consumption of Pisco still continues to grow. Some Chilean branded wineries are starting to export their own wines to the US or Europe to be bottled at their destination and sold under new brand names. Prices have seen a significant decrease, resulting in an increase in the number of recent deals.

### CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FOB PORT:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.52 – 0.65	↔	2013	Generic Red	0.49 – 0.58	↓
2013	Chardonnay	0.80 – 1.10	↔	2013	Cabernet Sauvignon (Basic)	0.60 – 0.67	↓
2013	Sauvignon Blanc	0.65 – 0.85	↓	2013	Cabernet Sauvignon (Standard)	0.68 – 0.95	↓
2013	Sauvignon Blanc (High Quality)	1.15 – 1.50	↓	2013	Cabernet Sauvignon (High Quality)	1.50 – 4.00	↔
2013	Pinot Noir	0.75 – 1.50	↔	2011 / 2012	Merlot	0.68 – 1.00	↓
2013	Syrah	0.68 – 0.88	↓	2013	Malbec	0.95 – 2.00	↔
2013	Carmenere	0.68 – 0.88	↓	2013			

### EXPORT FIGURES

Wine export Figures (Bulk, Bottled & Sparkling)	January – July 2012			January – July 2013			Volume
	Million Liters	Million US \$ FOB	Average Price	Million Liters	Million US \$ FOB	Average Price	Variance %
Bottled	243.8	786.3	3.22	238.3	778.5	3.26	- 2.25%
Bulk	134.4	154.5	1.15	272.8	235.2	0.86	102.87%
Sparkling Wines	1.5	6.3	4.2	1.5	6.2	4.1	- 3.30%
Packed Wines	22.8	46.9	2.05	39.7	57.9	1.45	73.90%
Total	402.5	994.0	2.46	552.3	1077.8	1.95	

### BITS AND PIECES

Bulk wine exports again show an increase (January – July) compared to the same period last year. A total of 272.8 million liters were exported, an increase of 102.87%. Bottled wines show a slight decrease of 2.25% over last year, along with sparkling wines (-3.3%). While the total wine exported shows an increase in volume, the average price has decreased from \$2.46/L in 2012 to \$1.95/L in 2013. Meanwhile, prices continue to show significant decreases in Chile.

## FRANCE – SEPTEMBER 2013

TIME ON TARGET

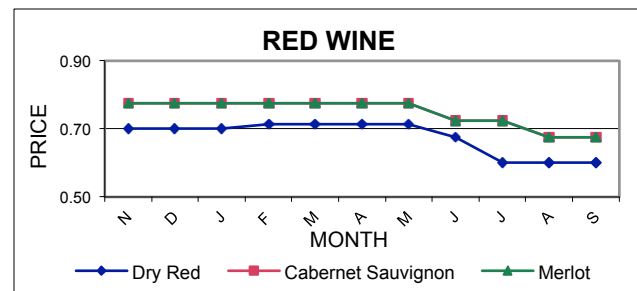
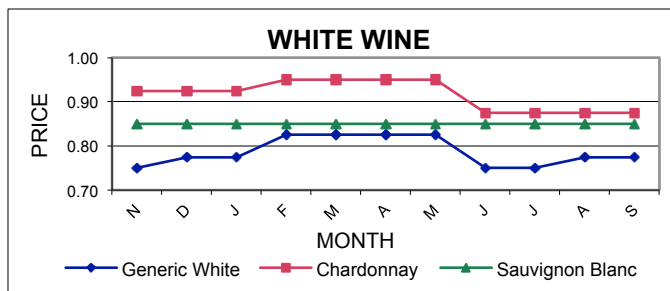
Harvest has just started in the South of France for the first early ripening grape varieties (mainly Muscat and Sauvignon Blanc). However, harvest hasn't yet kicked off in the other wine producing regions, such as Bordeaux, Burgundy and Loire Valley, still two weeks behind schedule. Meanwhile, there is still uncertainty regarding global crop size, as estimates have been revised again to 43.5 million hectoliters (-2.3 mhl compared to early August forecasts of 45.8 mhl). In Languedoc, volume forecasts have been revised to 13 mhl (only 1 mhl more than last year).

### CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White (VDF)	0.75 – 0.80	↔	2012	Generic Red (VDF)	0.55 – 0.65	↔
2012	Chardonnay (VDF)	0.85 – 0.90	↔	2012	Cabernet Sauvignon (VDF)	0.65 – 0.70	↔
2012	Chardonnay (IGP OC)	0.90 – 1.10	↔	2012	Cabernet-Sauvignon (IGP OC)	0.68 – 0.75	↔
2012	Sauvignon-Blanc (VDF)	0.80 – 0.90	↔	2012	Merlot (VDF)	0.65 – 0.70	↔
2012	Sauvignon-Blanc (IGP OC)	0.82 – 0.90	↔	2012	Merlot (IGP OC)	0.68 – 0.75	↔
2012	Generic Rosé (VDF)	0.70 – 0.75	↔	2012	Syrah (IGP OC)	0.65 – 0.75	↔
2012	Varietal Rosé (IGP OC)	0.80 – 0.85	↔	2012	Dry Muscat (IGP Oc)	0.95 – 1.05	↔

### BULK PRICING OVER TIME



### BITS AND PIECES

Every French region is in agreement that the 2013 vintage will be a very “technical” vintage. In fact, the delay in ripening will lead to high risk of fungus if weather conditions worsen, lower than normal sugar levels and higher acidity. In fact, chaptalization using dry sugar will be more generalized in northern producing regions (where it is permitted), whereas in Southern France (where it is prohibited), syndicates are lobbying for the right to use dry sugar instead of grape juice concentrate, which is more expensive.

In Languedoc, botrytis pressure remains high in many areas due to strong grape worm presence, but Mildew and Oidium are under control. In terms of quality potential, it remains too early to say, as September and October weather conditions will be decisive. The crop quality is believed to be very heterogenous, not only from region to region, but even within the same vine plots, so careful vineyard monitoring and grape sorting will be the key to a quality 2013 vintage.

## GERMANY – SEPTEMBER 2013

TIME ON  
TARGET

The bulk market has come to a halt, which is quite normal three weeks before the harvest season begins. At this time, buyers interested in purchasing generic white wines, but unfortunately there is almost no volume currently available. Pre-harvest prices for generic white grape juice (particularly Mueller-Thurgau) are already 20% above that of last year, and could end up around 1.10 – 1.20 €/liter for finished wines, if the situation were to stay firm. While it remains too early to forecast the outcome of the German crop, a shortage of white wine seems to continue. Although the harvest will start two weeks later than last year, a big part of 2013 white wines will be bottled and sold before the end of the year is even over.

### 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	1.10 – 1.30	↔
2012	Red Wine	0.65 – 0.80	↔
2012	Dornfelder	0.85 – 0.95	↔

### BITS AND PIECES

Wine Must Harvest in Germany 2012		
	Vineyard Area (ha)	Must Yield (hl)
Baden-Württemberg	26,569	2,308,182
Bayern	6,040	469,943
Hessen	3,507	261,376
Rheinland-Pfalz	62,103	5,986,246
Others	1,365	55,398
Germany Total	99,584	9,081,147

Annual Crush Tonnages				
2009	2010	2011	2012	2013 est.
1.31 m tonnes	0.98 m tonnes	1.30 m tonnes	1.27 m tonnes	1.3 m tonnes



## ITALY – SEPTEMBER 2013



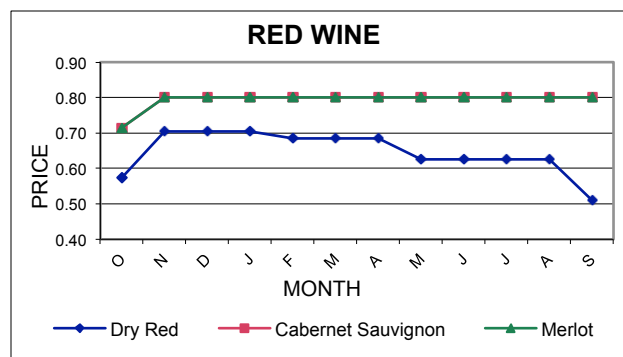
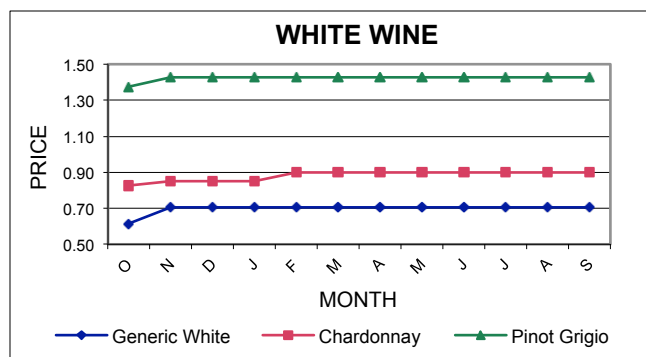
Mid-August market the start of harvest in southern Italy. The quality and volume look to be good. Precise figures are not yet available, but it seems that figures should be between 42 and 44.5 million hectoliters (as per Assoenologi on August 31, 2013). The upper part of this range seems to be the most reasonable, this being the result of the 650,000 hectares planted in Italy. Prices continue to hold, but some decreases are expected for generic wines, in order to compete with Spanish offers. For Prosecco and Pinot Grigio, as the stocks were low and the demand is still high, similar prices are expected for the time being.

### CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.66 – 0.75	↔	2012	Generic Red	0.48 – 0.54	↓
2012	Chardonnay	0.85 – 0.95	↔	2012	Cabernet Sauvignon	0.75 – 0.85	↔
2012	Pinot Grigio	1.35 – 1.50	↔	2012	Merlot	0.75 – 0.85	↔

### BULK PRICING OVER TIME



### BITS AND PIECES

It is interesting to note that the national consumption published by *Coldiretti* has reached a historical low of 22.6 million hectoliters for 2012. This can be compared to The United States with a national consumption of 29 millions hectoliters and France with 30 million hectoliters, making France the number one country for national consumption. This emphasizes the importance of wine exports for the Italian economy, as more than a half of the value for 2013 will be generated by wine exports.

The last *Nielsen* study for off-trade sales in the United States shows that of the 1.6 million cases of Italian wines sold, Prosecco accounts for nearly 42% or 690,000 cases!

## SOUTH AFRICA – SEPTEMBER 2013



There haven't been any big changes in the market over the last month. Wine sales and the movement of wine remain as per last month. Shipments for the last two months have been slower than previous months, mainly because of larger volumes that left earlier in the year, but also due to European holidays. Very wet conditions have persisted for most of August and most areas have the highest measured rainfall seen in several years.

### CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	4.35 – 4.50	↔	2013	Generic Red	5.80 – 6.30	↔
2013	Chardonnay	5.55 – 7.25	↔	2013	Cabernet Sauvignon	6.70 – 8.00	↔
2013	Sauvignon Blanc	5.75 – 7.80	↔	2013	Ruby Cabernet	5.85 – 6.30	↔
2013	Generic Rosé	4.65 – 6.00	↔	2013	Merlot	6.70 – 8.00	↔
2013	Cultivar Rosé	5.40 – 6.00	↔	2013	Pinotage	6.60 – 7.50	↔
2013	Chenin Blanc	4.50 – 5.35	↔	2013	Shiraz	6.80 – 8.25	↔
2013	Muscat	4.85 – 5.00	↔	2013	Cinsaut	5.85 – 6.30	↔

### BITS AND PIECES

Domestic Sales of Natural Wine (L)		
	July 2011 to June 2012	July 2012 to June 2013
Wholesalers	173,404,683	176,474,974
Private Cellars	44,339,677	48,020,704
Producer Cellars	100,367,660	98,090,984
Total	318,112,020	322,586,662

Total for Domestic and Export of Natural Wine (L)	
July 2011 to June 2012	July 2012 to June 2013
683,792,275	803,562,903

Export of All Natural Wine (L)	
July 2011 to June 2012	July 2012 to June 2013
365,680,255	480,976,241

- The month of August has shown similar wine export trends as the three months previous.
- Stock levels at almost all wineries are low in comparison to previous years, especially for white varietals.
- As per the tables above, it can be seen that local sales have gone up, while exports have risen sharply. The total wine that went into natural wine also increased during this period.
- Pricing on all wines is at a constant level with no big changes over the last four months.
- Availability on white wines, especially generic white, is extremely limited. There is still some dry red and red varietal wines available, such as Cabernet Sauvignon.

## SPAIN – SEPTEMBER 2013

TIME ON TARGET

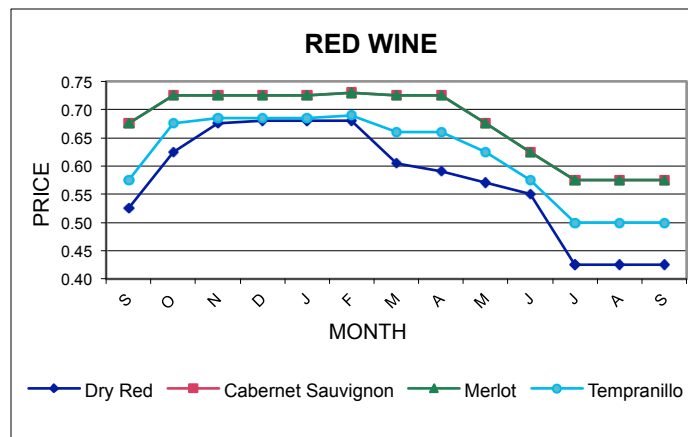
Harvest has just started in Spain, with a 15 to 20 day delay in most Spanish producing regions. First crop size estimates are announcing a bigger crop than last year, between 43 and 45 million hectoliters (compared to 33 to 35 million hectoliters last year). The sanitary state is believed to be perfect with no cryptogamic disease pressures and good grape size and weight. However, producers are closely following weather forecasts, as any unexpected bad weather could ruin the hopes for a good harvest.

### CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.45 – 0.50	↔	2012	Generic Red	0.40 – 0.45	↔
2012	Generic Rosé	0.45 – 0.50	↔	2012	Cabernet Sauvignon	0.55 – 0.60	↔
2012	Moscatel	0.70 – 0.80	↔	2012	Merlot	0.55 – 0.60	↔
2012	Syrah	0.55 – 0.60	↔	2012	Tempranillo	0.45 – 0.55	↔

### BULK PRICING OVER TIME



### BITS AND PIECES

In terms of grape pricing, overall opinion is that the market price should definitely be lower than last year, but it is still hard to have a precise overview on a national basis. This comes after historically high prices that impacted the whole buying campaign and leading to a loss of volumes sold, purchase contract cancellations and price re-negotiations. However, it is certain that it will be impossible to return to the very low grape buying prices seen three to five years ago, as growers are looking for a certain price in order to be economically profitable.

Cooperatives are already starting to quote for pre-harvest contracts in the region of 3.50-4 EUR/L, depending on color and degree, whereas this was not the case last year at this time. Both producers and negociants will be very quick and aggressive in quoting, in an attempt to gain back the market share they lost last year in favor of new world producers (at least on the European markets).

## BUYER'S CORNER: GERMANY – SEPTEMBER 2013

The total wine consumption in Germany in 2012 was 17.7 million hectoliters. Of this total, red and rose wine account for 11 million hectoliters, while white wine amounts to 6.7 million hectoliters.

Production:

- 2.4 m hl case good production by German cooperatives (111 companies)
- 2.6 m hl case good production by German wine growers (nearly 8,000 companies)
- 10.9 m hl bottled wine by approximately 200 companies that buy wine in bulk, of which 6.9 m hl is imported and 4 m hl is German wine
- The remaining 1.8 m hl is the trade surplus between 6.2 m hl case good imports and 4.4 m hl case good exports.

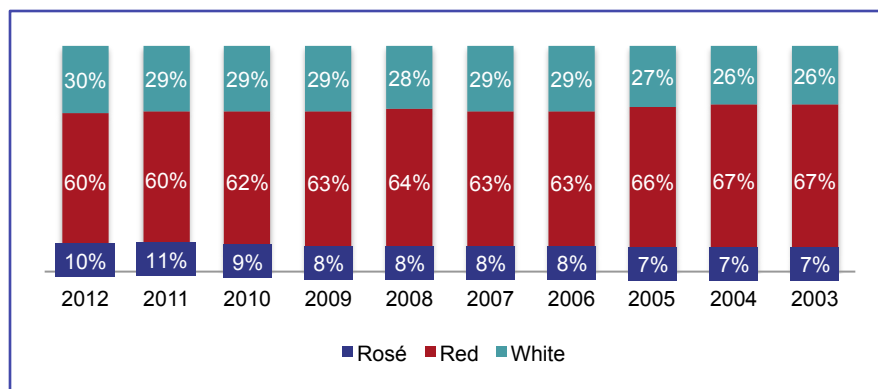
The total value amounts to 7.3 billion Euros (4.12 Euros per liter) as follows:

- 12 m hl sold by 54,000 food trade outlets and 4,000 wine stores (4.6 billion Euros at 3.83 Eur/L)
- 3.1 m hl consumed in the gastronomy (6.2 billion Euros in value, or 20 Eur/L)
- 2.6 m hl sold direct to consumers by German cooperatives and wine growers (1.56 billion Euros in value, or 6 Eur/L)

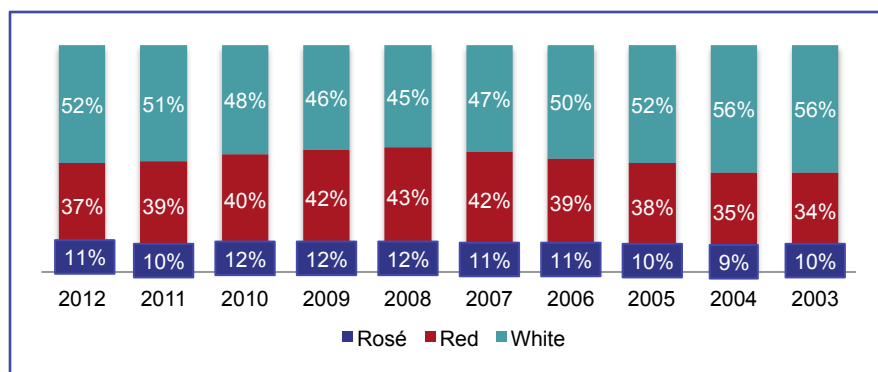
## CONSUMER BUYING TRENDS

The two graphs below depict the consumer buying trends between red, rose and white wine in Germany throughout the last decade for both imported wine and German wine.

Imported Wine



German Wine





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