



CIATTI

GLOBAL WINE & GRAPE BROKERS

GLOBAL MARKET UPDATE – APRIL 2013

VOLUME 4 ISSUE NO. 4

April marks the end of harvest for much of the Southern Hemisphere, and all predictions call for strong numbers across the board. All major supply countries are expecting harvests that are nearly equal to, or greater than that of last year. Argentina should see the largest increase in production, as the 2012 vintage year was much lower than the average. Chile looks to increase on its record 2012 crop, with Australia and South Africa looking to match results of previous years.

The annual ProWein event was held in Germany in March, and buyers and sellers of bulk wine were active. The trade show was well attended, and most of the exhibitors seemed happy with the results. Most agree that despite low 2012 harvest numbers from Europe, pricing on the bulk market continues to soften, giving buyers relief from the historic highs that were experienced over the past several quarters. While generic wines are short of supply, most varietals are balanced, with some trending towards a long position.

Thank you to everyone that visited the Ciatti stand at ProWein. We look forward to seeing many of you next month in London.



ARGENTINA – APRIL 2013



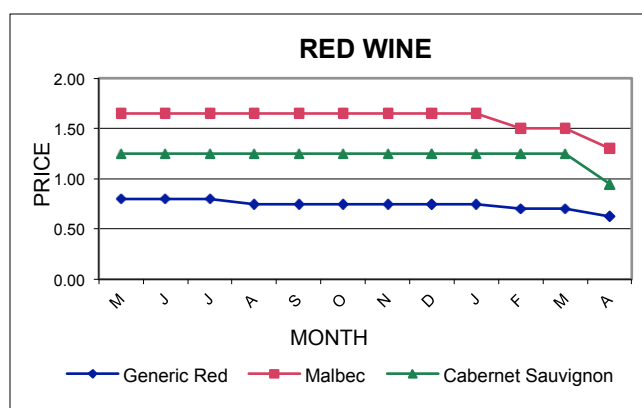
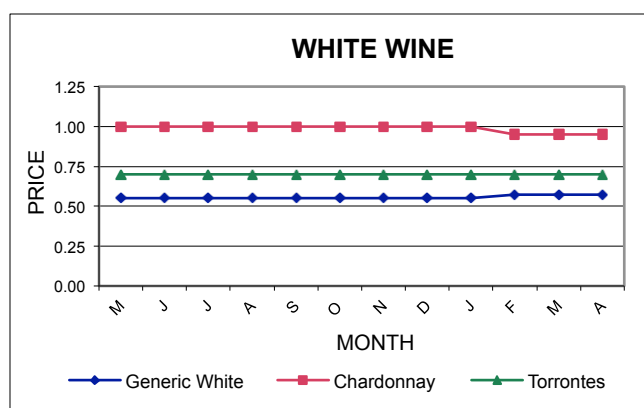
Harvest is progressing with good results in terms of volume and quality. The grape market remains tough, with prices holding for varieties, but activity and sales have been slow. Prices and volume have been strong for Criolla, as the White Grape Juice Concentrate business is attractive.

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

Bottled export sales dropped 34% in February, as a result of the poor economy. This has affected the wine business in Argentina, with local bottled wine sales decreasing, along with the bulk wine and Concentrate deals.

Also in February, bulk wine exports fell 42%.

Looking at the first two months of 2013, the total wine and Concentrate sales dropped 9.73%.

Many wineries are currently for sale, due to the current economic situation in Argentina.

There are many uncertainties about the future of the industry with the way the business is at the moment.

AUSTRALIA & NEW ZEALAND – APRIL 2013

TIME ON
TARGET

Vintage is wrapping up as most regions have finished harvesting grapes and crushing material, with only small cool climate areas being the last to be picked. Quality of material across the board is anticipated to be high and volumes are expected to make for an average year. The warm weather in early January increased vine activity and condensed the harvesting period into a shorter timeframe. There was some rain late in the season in some areas which has caused a low concern for the late picked fruit. Overall, however, 2013 has had excellent grape growing conditions.

CURRENT MARKET PRICING

ALL PRICING IN AUD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
NV	Dry White	0.60 – 0.80	↔	NV	Dry Red	0.70 – 0.80	↔
2012	Chardonnay	0.75 – 0.90	↓	2012	Cabernet Sauvignon	1.05 – 1.30	↔
2012	Sauvignon Blanc	0.85 – 1.00	↔	2012	Merlot	1.05 – 1.30	↔
2012	NZ Marlborough SB	NZ 5.50 – 6.00	↔	2012	Shiraz	1.05 – 1.20	↔
2012	Pinot Gris	0.95 – 1.20	↔	2012	Muscat	0.85 – 1.00	↓

BITS AND PIECES – AUSTRALIA

Australia continues to battle with the high Aussie dollar meaning imported bottled wines have been more affordable than before. For the year ending 2012, imported wines rose 10% to 84 million liters. This also includes New Zealand wine, as Aussies have increased their imports of New Zealand Sauvignon Blanc by over 1,300% in the last 12 years, adding to the 56.5 million liters of foreign white wine consumed. Sales of red foreign wine have only increased by 120% for the same period. This trend is expected to continue while the Aussie dollar remains strong and Marlborough Sauvignon Blanc continues on a high ride of popularity.

The recent 2013 ProWein wine fair held in Dusseldorf, Germany has set a new record with the largest number of Australian attendees and exhibitors visiting this year. Australians have been favoring the increasing popular ProWein festival over the London International Wine Fair, with many in the industry now leaning away from the UK fair entirely.

BITS AND PIECES – NEW ZEALAND

Harvest in the North island is nearly completed, with only a small amount of red grapes to go. The quality is fantastic for all varieties and quantities are close to plan, with only a few ups and downs across varieties.

The harvest in Marlborough has started and many varieties are all ripening at the same time. Quality, again, is exceptional with good primary fruit characters and quantity currently slightly down from estimates.

CALIFORNIA – APRIL 2013

California Grape Acreage Report

TIME ON
TARGET

Results from the 2012 California Grape Acreage Report were released. Total grape plantings represents 847,000 acres (342,768 hectares). Wine grape plantings were at 508,000 bearing and 38,000 non-bearing acres (7.5%). Chardonnay, Colombard and Muscat varieties were the leading white varieties planted. Cabernet Sauvignon dominated red plantings, followed by Pinot Noir, Rubired and Malbec.

Table grape acreage represents 98,000 acres: 85,000 bearing and 13,000 non-bearing (15%). Raisin grape acreage decreased by 5,000 acres to 200,000 acres. Note that this was 287,000 acres in 2000.

There are rumors of many additional acres currently under contract to be planted this spring and in 2015. It is always noted that reporting data supplied is optional and reflects the 2012 season.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.80 – 1.05	↔	2012	Generic Red	0.99 – 1.32	↔
2012	Chardonnay	1.05 – 1.45	↓	2012	Cabernet Sauvignon	1.72 – 2.38	↓
2012	Pinot Grigio	1.32 – 1.58	↔	2012	Merlot	1.58 – 1.98	↓
2012	Muscat	1.18 – 1.45	↓	2012	Pinot Noir	2.11 – 2.64	↔
2012	White Zinfandel	1.18 – 1.32	↔	2012	Syrah	1.58 – 1.98	↔
2012	Colombard	0.86 – 1.06	↔	2012	Zinfandel	1.72 – 2.38	↓

BITS AND PIECES

Grape buying activity continues to be brisk on the limited vineyards that are open. We continue to re-contract previous vineyards, in many cases to multiple years. Pricing has remained steady.

Bulk wine sales activity continues with purchases from negociant brands, along with wines destined to new and growing labels within various larger wineries. Pricing has settled in comparison to the extremes seen last season. Inventories continue to become available from most appellations and varieties.

Springtime weather and bud break is happening throughout the West Coast. Growers and vintners remain anxious about potential frost conditions and lack of rain this season to date.

Leading Varietals: Acres Planted & % Planted of White/Red					
	Whites	% of Whites		Reds	% of Reds
Chardonnay	95,000	53%	Cabernet Sauvignon	80,600	27%
French Colombard	22,400	12%	Zinfandel	47,600	16%
Sauvignon Blanc	15,200	8%	Merlot	45,600	15%
Pinot Grigio	12,800	7%	Pinot Noir	39,600	13%
Muscat Types	8,000	4%	Syrah	18,700	6%
Chenin Blanc	6,000	3%	Rubired	12,200	4%
White Riesling	4,400	2%	Petite Sirah	8,600	3%
TOTAL WHITE		89%	TOTAL RED		84%

Source: California Department of Food & Agriculture

CHILE – APRIL 2013

TIME ON TARGET

Grapes that have not been contracted are not being sold below the announced market price. Nevertheless, this is a small portion of the total grape market. The harvest is delayed by an estimated two weeks. Approximately 35% of grapes have been harvested thus far. The quality is looking to be similar to that of last year, but lower in brix. Volumes should be similar or slightly higher than 2012. Northern valleys like Elqui and Coquimbo are still experiencing a drought and smaller production. This is causing some availability problems for Muscat, since some Pisco producers are currently demanding Muscat.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FOB PORT:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.63 – 0.70	↔	2012	Generic Red	0.55 – 0.75	↔
2012	Chardonnay	0.80 – 1.10	↔	2012	Generic Red (Basic)	0.50 – 0.55	↔
2012	Sauvignon Blanc	0.75 – 0.95	↓	2012	Cabernet Sauvignon	0.75 – 0.80	↓
2012	Sauvignon Blanc (High Quality)	1.15 – 1.70	↓	2012	Cabernet Sauvignon (Estándar)	0.85 – 0.95	↓
2012	Pinot Noir	1.10 – 1.50	↔	2012	Cabernet Sauvignon (High Quality)	1.50 – 4.00	↔
2012	Syrah	0.75 – 0.95	↓	2012	Merlot	0.78 – 1.25	↓
2012	Carmenere	0.78 – 0.95	↓	2012	Malbec	0.95 – 2.00	↔

EXPORT FIGURES

Wine export Figures (Bulk, Bottled & Sparkling)	January-February 2012			January-February 2013			Vol. Var
	MM Lts	M US\$ FOB	Avg Price	MM Lts	M US\$ FOB	Avg Price	%
Bottled	52.5	174.6	3.33	55.1	186	3.37	5.0%
Bulk	50.4	60.8	1.21	81.1	81.7	1.01	60.7%
Grape Musts (GJC & Alcohol)	2.0	3.8	1.9	0.9	2.4	2.67	- 55.7%
Sparkling Wines	0.4	1.5	3.96	0.4	1.5	4.25	- 8.7%
Fruit Wines	0.1	0.5	4.63	0.1	0.7	4.77	18.9%
Packed Wines	4.9	10.7	2.16	5.6	11.7	2.07	14.1%
Total	110.4	145.5	2.28	76.5	283.9	1.98	29.8%

BITS AND PIECES

A two week strike in San Antonio Port has now ended, though it has caused many delays and extra costs.

In the first quarter of 2013, the Chilean Peso strengthened 1.4% against the US Dollar. Export figures for February 2013 show a 60.7% increase in volume for bulk wine, compared to January and February of last year (81.1 MM L vs. 50.4 MM L in 2012). Bottled exports grew by 5% (55.1 MM L vs. 52.5 MM L in 2012).

The 10 most important markets for Chilean wine in February were: USA, the UK, Japan, China, the Netherlands, Canada, Brazil, Ireland, Denmark and South Korea. The biggest surprise is China in 4th place, with rates of 89% for turnover and volume.

FRANCE – APRIL 2013

TIME ON TARGET

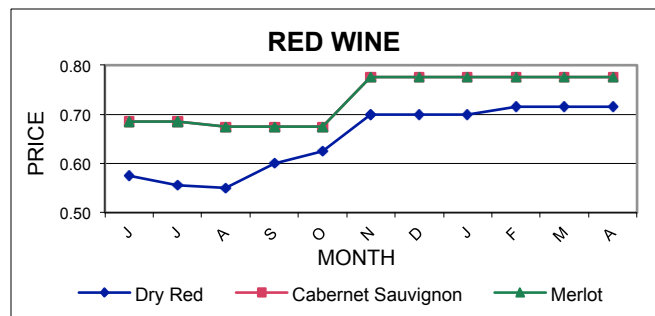
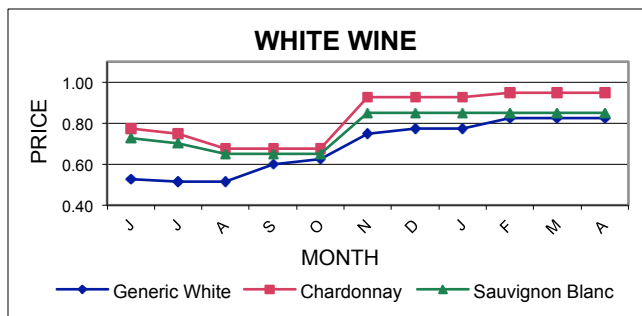
The second phase of the buying campaign in France has just been launched. Although it may be too early to tell, it seems that effects from ProWein are starting to be seen. Chardonnay, Sauvignon and rosé varietals are still the most searched and sought after wines, but supply is getting really tight on the first-hand market. The last remaining big single batches will soon only be in the hands of the negociants. On the red varietal side, the market remains active for most varietals, as a comfortable supply keeps the market balanced. The majority of the inventory available is made up of IGP Pays d'Oc wines, as Vin de France stock is at its lowest in most of the regions. Prices, however, remain stable without any significant increases yet.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.80 – 0.85	↔	2012	Generic Red (VDF)	0.68 – 0.75	↔
2012	Chardonnay (VDF)	0.90 – 1.00	↔	2012	Cabernet Sauvignon (VDF)	0.75 – 0.80	↔
2012	Chardonnay (IGP OC)	0.95 – 1.10	↔	2012	Cabernet-Sauvignon (IGP OC)	0.76 – 0.90	↔
2012	Sauvignon-Blanc (VDF)	0.80 – 0.90	↔	2012	Merlot (VDF)	0.75 – 0.80	↔
2012	Sauvignon-Blanc (IGP OC)	0.85 – 0.95	↔	2012	Merlot (IGP OC)	0.76 – 0.90	↔
2012	Generic Rosé (VDF)	0.70 – 0.75	↔	2012	Syrah (IGP OC)	0.75 – 0.80	↔
2012	Varietal Rosé (IGP OC)	0.76 – 0.88	↔	2012	Dry Muscat (IGP Oc)	0.95 – 1.05	↔

BULK PRICING OVER TIME



BITS AND PIECES

After an unusually cold end of winter, there have been regular rainfalls in Languedoc throughout the last two weeks, followed by a rise in temperatures. These conditions look to be good and will lead the vines out of dormancy. Although it might be too early to say, as harvest remains five months away, these conditions could lead to a certainly larger crop than in 2012. Growers are confident, but remain neutral about the fact that an oversized crop that could impact the market balance; especially after the last price increase they managed to get on a short 2011 crop. This, wine merchants will not soon forget.

GERMANY – APRIL 2013



Most of the international guests who attended ProWein in Dusseldorf may have recognized that spring in Germany is very late this year. Many growers are already comparing this late beginning of the growing season with a period in the 1980s when some regions had difficulty reaching ripening levels for a drinkable wine. Even though it is still too early to predict, it has already had some influence on the willingness to sell bulk wine in Germany.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend
2012	White Wine	1.00 – 1.10	↔
2012	Pinot Grigio	1.40 – 1.50	↔
2012	Riesling	1.10 – 1.30	↓
2012	Red Wine	0.75 – 0.90	↔
2012	Dornfelder	0.85 – 0.95	↔

BITS AND PIECES

Riesling has always been that flagship wine of Germany. However, Pinot Noir may one day take its place. The number of plantings of Pinot Noir in Germany has nearly doubled over the last ten years.

Globally, Germany is third in terms of the largest number of Pinot Noir hectares planted.

Not only does Germany have a large number of Pinot Noir plantings, it is also gaining recognition for the quality of the wine. In fact, Germany took 7 of 10 spots in an International Pinot Noir blind tasting that was held in London in 2011.

Hong Kong merchants are even beginning to recognize it as a quality alternative to Pinot from France.

Pinot Noir: World Wide Plantings

Country	Vineyard Area (Hectares)	Share (%)
France	30,659	35.4
US (California, Oregon, Washington)	21,037	24.3
Germany	11,756	13.6
Australia	5,061	5.8
New Zealand	4,828	5.6
Switzerland	4,352	5.0
Italy	3,300	3.8
Chile	2,130	2.5
Argentina	1,681	1.9
South Africa	962	1.1
Austria	649	0.8
Luxembourg	102	0.1
TOTAL	86,517	100

ITALY – APRIL 2013

TIME ON TARGET

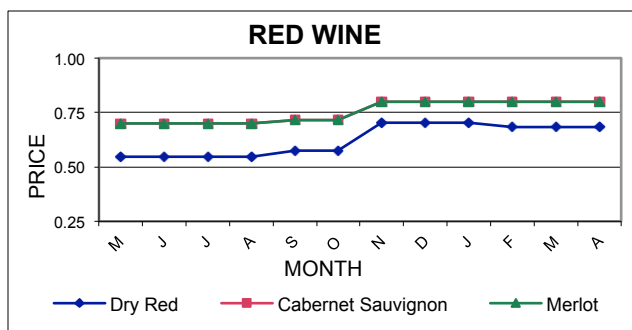
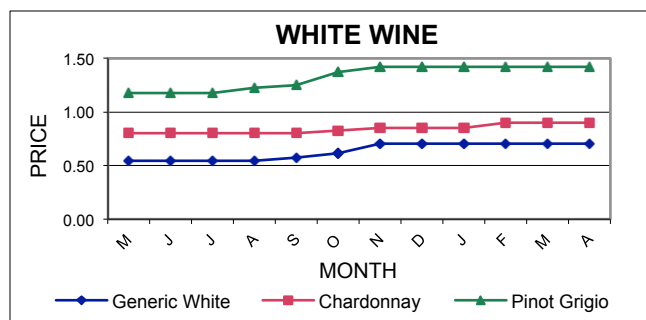
Vinitaly, an International Wine and Spirits Exhibition held in Verona, is now coming to a close. The weather was unusually cold and rainy for this time of year. The big wine fairs which help wine producing countries, are fairs that freeze the evolution of prices. At the moment, everyone is awaiting the end of April or beginning of May, to ensure that the risk of frost will have passed. Rainfall in recent months was good, and all the components are leading us to hope for a good crop for 2013. Everyone in Italy seems to be missing two things: the sun and a new government!

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	0.64 – 0.73	↔
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

In terms of the Italian market, not much has changed since last month's report. The Italian bulk wine market situation hasn't changed significantly. Prices remain stable for white, rosé and all other varieties. Red wine is on somewhat of a downward trend, but only for certain contracting conditions, such as upfront payment and immediate loadings.

The national consumption of wine is down in Italy (the latest figures from GDO are showing -4% for the first three months of 2013) and it seems that the main consumers of Italian wines are even consuming less, partly due to the poor weather conditions.

As previously mentioned, there is a structural issue in Italy, with a high number of bottlers and a lack of strong brands. We can expect some bankruptcies if some of these companies are not able to transfer their increase in production costs and obtain enough or even higher turnover. This is true especially when considering the large need for cash flow, due to the new national payment terms (60 days for suppliers).

SOUTH AFRICA – APRIL 2013



Harvest will be finished in most regions of South Africa by mid-April. Crop predictions remain the same as last month, with the 2013 harvest estimated to be around 1.38 million tons. This estimate would mean that the 2013 harvest may be about the same as in 2012. Good growing conditions persisted with only some late rain in particular areas during Easter weekend, which may be a problem for some late varieties.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012 / 2013	Generic White	4.35 – 4.50	↔	2012 / 2013	Generic Red	5.80 – 6.30	↔
2012 / 2013	Chardonnay	5.55 – 7.25	↔	2012 / 2013	Cabernet Sauvignon	6.70 – 8.00	↔
2012 / 2013	Sauvignon Blanc	5.75 – 7.80	↔	2012 / 2013	Ruby Cabernet	5.85 – 6.30	↔
2012 / 2013	Generic Rosé	4.65 – 6.00	↔	2012 / 2013	Merlot	6.70 – 8.00	↔
2012 / 2013	Cultivar Rosé	5.40 – 6.00	↔	2012 / 2013	Pinotage	6.60 – 7.50	↔
2012 / 2013	Chenin Blanc	4.60 – 5.10	↔	2012 / 2013	Shiraz	6.80 – 8.25	↔
2012 / 2013	Muscat	4.85 – 5.00	↔	2012 / 2103	Cinsaut	5.85 – 6.30	↔

BITS AND PIECES

Domestic Sales and Export of Natural Wine in South Africa

- The following tables show the growth in the local market and the export market over the last year.

Total exported wine by varietal:

- Red wine 162,908,776 liters (39.8%)
- White wine 216,025,205 liters (52.8%)
- Rose 30,035,080 liters (7.4%)

Total exported wine:

- Packaged 160,535,926 liters (39.3%)
- Bulk 248,433,135 liters (60.7%)
- Exports of bulk wine has shown more change over the last six months, along with the growth in exports of rosé wines.

Domestic Sales of Natural Wine (Gross Liters)

	Jan 2011 to Dec 2011	Jan 2012 to Dec 2012	Trend
Wholesalers	167,325,915	172,924,157	103.3
Private Cellars	43,864,202	46,186,381	105.3
Producer Cellars	996,221,890	100,708,976	101.1
TOTAL	310,812,306	319,819,514	102.9

Export of Natural Wine (Gross Liters)

	Jan 2011 to Dec 2011	Jan 2012 to Dec 2012	Trend
TOTAL	350,415,001	408,969,061	116.7

Domestic Sales & Export of Natural Wine (Gross Liters)

	Jan 2011 to Dec 2011	Jan 2012 to Dec 2012	Trend
TOTAL	661,227,307	728,788,575	110.2

SPAIN – APRIL 2013

TIME ON TARGET

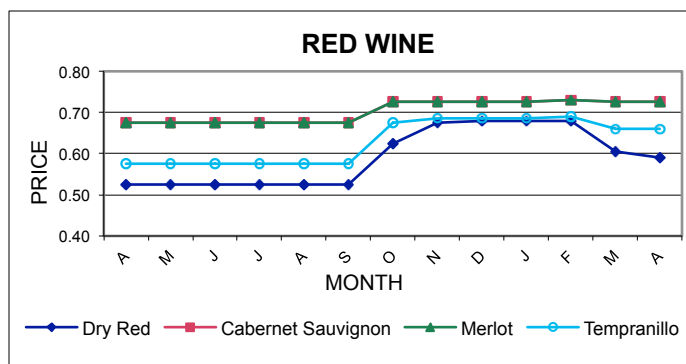
The Spanish market over the last month has been quite confusing for most international buyers. Due to a high pricing strategy during the first part of the buying campaign, both cooperages and wine merchants have registered an exceptional increase in sales and in value. However, Spain has lost important price-driven markets (Russia, China, historic European clients) in favor of Chile and South Africa. Only the end of campaign figures will prove this strategy to be successful or not.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.58 – 0.64	↓	2012	Generic Red	0.56 – 0.62	↓
2012	Generic Rosé	0.58 – 0.62	↓	2012	Cabernet Sauvignon	0.70 – 0.75	↔
2012	Moscatel	0.78 – 0.82	↓	2012	Merlot	0.70 – 0.75	↔
2012	Syrah	0.65 – 0.70	↔	2012	Tempranillo	0.64 – 0.68	↓

BULK PRICING OVER TIME



BITS AND PIECES

The industry was claiming for a Spanish price strategy re-adjustment and it seems that producers/sellers have understood the message, as we are now noticing a downward pricing trend. The market is not collapsing, but the price decreases have caught new interest from international buyers. It remains to be seen whether this will lead to big sales immediately. Everybody now remains in a wait-and-see situation, looking at bargains and opportunities, knowing that dry red inventory is really ample and dry white is still available in good-sized batches.

Although Spanish exports are moving at a slow pace, Spanish wine merchants continue to buy, specifically from South America and Chile. From January to February 2013, Spain imported 16 million liters of Chilean wines at an average price of \$0.58 per liter for a total of \$9.2 million. Buyers continue to search in most producing regions for pre-harvest opportunities. This strategy could be an attempt for the Spanish to keep their historically low-priced market alive, switching to New World supply (EXW Spain), and thus maintain Spanish products at slightly lower prices, while not significantly underpriced.

BUYER'S CORNER - APRIL 2013: PROWEIN RECAP



ProWein continues its momentum, and it is certainly now considered the premier annual international wine trade show. The halls were alive with activity, and business was moving at a brisk pace. Questions about the direction of the markets were abundant, as many markets seemed to be shifting downward from a price perspective.



Düsseldorf
24.-26.3.2013

Düsseldorf ProWein 2013

- There were two additional exhibition halls versus last year, for a total of seven halls.
- 4,783 exhibitors from 48 countries attended.
- Many Importers from European countries also had their own stand: The UK, Belgium, The Netherlands, etc.
- Some Importers were traditionally exhibiting at the London International Wine Fair (LIWF), but decided to focus on ProWein only, rather than both.
- More than 44,000 trade visitors attended ProWein 2013.
- Many of the Scandinavian monopoly buyers and retail buyers from various countries attended the show.
- ProWein will be in Shanghai, China for the first time November 10-15, 2013.
- ProWein 2014 will take place in Düsseldorf March 23-25, 2014. This will mark the 20th anniversary for Düsseldorf ProWein!

Observations

Bulk wines

- Increased interest for Australia, New Zealand, Chile and South Africa.
- Many Italian wines.
- The interest for low alcohol wine from UK and Scandinavia seems to come from tax increases and governmental attempts to curb alcohol consumption.
- In the UK, the government did not completely forget the idea of having a minimum price for alcohol.
- Scandinavia and particularly Sweden are still interested in UK market trends on wines. As in Finland, the trade of alcohol in Sweden and Norway is ruled by the Monopolies. This is to “educate” consumers on wines of low alcohol, Organic wines, Fair Trade wines, etc.
- In Scandinavian countries, the advertisements, journalists writings and medias also highly contribute to (have a huge impact on) consumer behavior and the potential success of wines.

Exhibitors

- More producers from Eastern Europe were in attendance this year, from Romania, Croatia, Bulgaria, Moldavia and more.
- There were many exhibitors under a “Fair Trade” label, especially from South Africa.
- Again this year there was a hall especially dedicated to Organic Wines. Germany and the Netherlands are two very big importing markets for Organic wines in Europe.
- Brazil still seems to be raising interest in many people.

Bottles

- More innovations come from aromatized products with a wine base, rather from wines themselves.
- All well-known groups are launching their brands and claim that quality of the wines used are no longer entry-level, but rather Premium styles.



CIATTI

GLOBAL WINE & GRAPE BROKERS

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