



CIATTI

GLOBAL WINE & GRAPE BROKERS

GLOBAL MARKET UPDATE – NOVEMBER 2013

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It appears that the biggest news for the wine market this past month was generated by a report concluding that the world is heading into a wine shortage. There certainly were no shortages of opinions on the subject, and the great debate rages forward. Most suppliers in the bulk market are not feeling any sense of a great shortage on the horizon, as most supply markets continue to trend towards a long position. Expectations are for reports to reveal a very healthy sized crop in the northern hemisphere, and Spain leads the way with an estimated record crush. California estimates continue to be for a very strong harvest year. France, while showing a step forward from last year, will essentially have an average to below average year.

Inventory remains low in South Africa, after a very busy 2013 campaign, but the story looks different in the remaining markets of the southern hemisphere. As always, the strength of the market continues to be varietal-dependent, but the bulk inventory in most producing countries is leaning more towards long than short.

Based on the larger 2013 harvests across the board, it seems that the potential for any sort of wine shortage would likely be some years down road. Current world vineyard acreage appears to be able to cover current and near future demands, and both new and re-plantings have been seen in some areas. The market is very dynamic and frost, rain, hail, wind and disease always play havoc with supply, but we seem to be at place of balance in the world today.



ARGENTINA – NOVEMBER 2013

TIME ON
TARGET

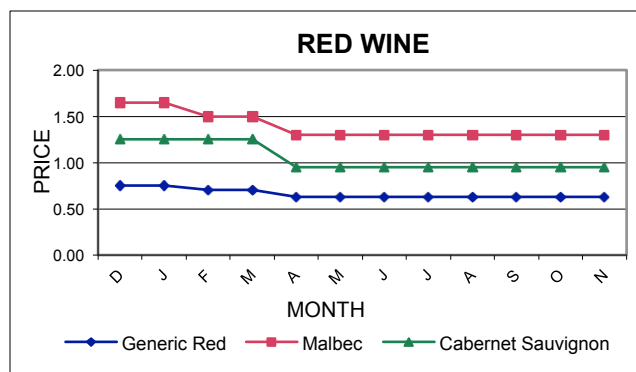
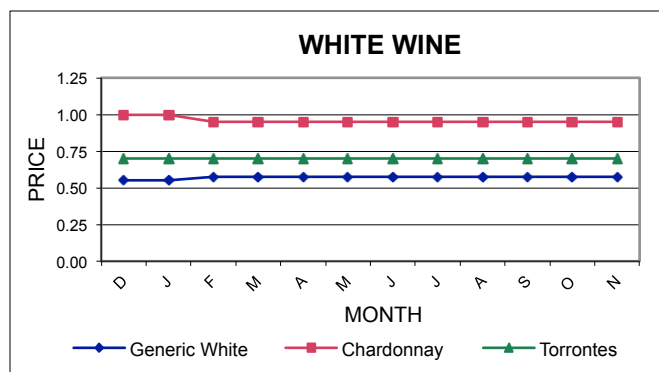
After good weather throughout the month of October, it is now starting to heat up in Argentina. The risk for frost has passed without much damage caused. The National midterm elections for Parliament have passed and the government party has lost most of the main urban provinces. Meanwhile, the President is still on leave for a surgery done last month, and the economy continues to crash. There are big expectations surrounding what the government will do next.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FCA WINERY:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.55 – 0.60	↔	2013	Generic Red	0.60 – 0.65	↔
2013	Generic White (Criolla)	0.50 – 0.55	↔	2013	Cabernet Sauvignon	0.90 – 1.00	↔
2013	Chardonnay	0.90 – 1.00	↔	2013	Malbec	1.20 – 1.40	↔
2013	Torrontes	0.65 – 0.75	↔	2013	Malbec Reserva	1.60 – 1.80	↔
2013	Chenin Blanc	0.65 – 0.75	↔	2013	Syrah / Merlot	0.90 – 1.00	↔
2013	Muscat	0.65 – 0.75	↔	2013	Bonarda / Tempranillo	0.85 – 0.95	↔

BULK PRICING OVER TIME



BITS AND PIECES

Export bulk wine sales have decreased 41% compared to last year.

Case good exports are down 0.5% and White Grape Juice Concentrate exports are down 16.1%.

Local bulk wine activity has been very slow and there are currently many offers for all types of wines.

Prices remain stable, with a downward tendency.

AUSTRALIA & NEW ZEALAND – NOVEMBER 2013

TIME ON
TARGET

Australia has seen a number of its grape growing regions hit by frost in recent weeks. One of the main vineyard areas of Australia, the Riverina region in NSW, has been affected by the frost. Estimates of damage vary in size for those hit, but most reports are for approximately a 20% reduction across the board. Patchy areas in the north of the Barossa region, especially Ebenezer, Eden Valley and Bethany, were frost affected, along with small areas in Langhorne Creek and Currency Creek. Another heavily affected area, Canberra, has also reported mixed accounts of frost damage, with temperatures dropping below 0°C on consecutive nights.

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

The Winemakers Federation of Australia has put forth suggested plans of action in regards to reforming the current WET Rebate. The wine industry body has been pushing for legislation changes that seek to tighten the WET rulings currently in place. Some suggestions of the WFA include:

- Restricting the WET rebate eligibility to producers that have production assets in order to grow their own grapes or make their own wine under their own brand for sale to the consumer.
- Removing the WET rebate scheme for New Zealand.
- Removing the WET rebate scheme from bulk, unpackaged and unbranded wine, and any wine that is not in a finished state and ready for retail sale.

(Source: Winemakers Federation of Australia – Proposed Industry Actions for Sustained Profitability – Your Views? August 2013)

BITS AND PIECES – NEW ZEALAND

Wine exports from New Zealand are on the rise, as they report a record year for 2012-2013. Volumes of wine have declined by 5%, but the value of wine has increased by 3% to NZ \$1.2 billion. New Zealand continues to tap into new markets in order to continue their export rise. This has been seen in the US with an increase of 13%, and a rise of 25% in Germany. Sauvignon Blanc is the main varietal of wine exported, accounting for nearly 85%.

CALIFORNIA – NOVEMBER 2013



TIME ON TARGET

With all wineries now finished with crush, early assessments are that the 2013 vintage could surpass the 2012 record volume. Regardless, there is plenty of wine in tank and buyers are needed. Much of this production from the Central Valley will be available for export or absorbed in domestic value programs, as volumes of previously imported bulk volumes decrease. The extra bulk volume in the coastal regions will need to find higher value programs in the domestic markets.

Coastal Regions

All premium regions of California had excellent crops, with few reports of rot and disease. Weather patterns held nicely throughout harvest. Winemakers are touting some great wines produced from all coastal areas. Those reports cover both red and white wines.

Central Interior

Similar reports of both quality and abundance were common from producers in the Valley. There are accounts of both good colors and maturity in reds. Cabernet Sauvignon, Merlot, Zinfandel and Pinot Noir are again plentiful this year. White varieties such as Chardonnay and Sauvignon Blanc came in heavy, but with good flavors.

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	1.32 – 1.98	↓

BITS AND PIECES

Total shipment sale were down (-5%) for the month of August and ahead only +2.7% year-to-date. This reflects decreases in imported bulk wine and soft growth of California produced wine. The growth of Gallo and Constellation alone represents the majority of all the increases from California producers. Imported case goods advanced (+7%) year-to-date.

CHILE – NOVEMBER 2013

TIME ON
TARGET

The frost period is now over and temperatures have been high. The actual effects of the frost will be measured towards the end of December to the beginning of January when the second growth will take place. Chardonnay grapes are showing the most damage, while Pinot Noir grapes show moderate damage and Sauvignon Blanc fared the best with minimal damage. The domestic market has been very active for Chardonnay, and prices have gone up considerably. Chardonnay grape transactions for 2014 are active. The export market, meanwhile, has been quiet.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FOB PORT:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.60 – 0.75	↑	2013	Generic Red	0.50 – 0.60	↔
2013	Chardonnay	0.90 – 1.50	↑	2013	Cabernet Sauvignon (Basic)	0.60 – 0.74	↔
2013	Sauvignon Blanc	0.74 – 1.17	↑	2013	Cabernet Sauvignon (Standard)	0.75 – 0.95	↔
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 – 1.00	↔
2013	Syrah	0.65 – 0.88	↔	2013	Malbec	0.95 – 2.00	↔
2013	Carmenere	0.65 – 0.88	↔	2013			

EXPORT FIGURES

Wine export Figures (Bulk, Bottled & Sparkling)	January – September 2012			January – September 2013			Volume
	Million Liters	Million US \$ FOB	Average Price	Million Liters	Million US \$ FOB	Average Price	Variance %
Bottled	317.21	1,024.09	3.23	308.61	1,014.82	3.29	- 2.71
Bulk	168.58	190.15	1.13	322.85	279.23	0.86	91.52
Sparkling Wines	2.45	9.94	4.06	2.11	8.89	4.21	- 13.69
Packed Wines	20.69	40.55	1.96	20.15	40.33	2.00	2.61
Total	508.92	1,264.73	2.59	653.73	1,343.27	2.59	

BITS AND PIECES

Bulk wine exports increased from January to September, compared to the same period last year. A total of 322.85 million liters were exported, showing an increase of 91.52%. Bottled wines show a decrease of 2.71% over last year, along with sparkling wines down 13.69% and case goods down 2.61%. This is the first time in history that the volume exported was larger in bulk wine compared to bottles wines (322.85 million liters bulk vs. 308.61 million liters bottled).

While the total wine exported shows an increase in volume, the average price remains the same.

FRANCE – NOVEMBER 2013

TIME ON TARGET

The harvest season came to an end in France a couple of weeks ago. The results registered in the cellars prove the latest crop size estimates to be correct. The exact figures by varietal are not yet known, but should be around 44.1 million hectoliters. Alcoholic and malolactic fermentations are still in progress in most regions, but most people are in agreement that the 2013 vintage is a very technical vintage. This is particularly true for the northern and southwestern regions (Burgundy, Bordeaux, etc), which suffered from fungus during the harvest, low potential alcohol levels and unripe polyphenolic components.

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)	0.90 – 0.95	↑	2013	Cabernet Sauvignon (VDF)	0.75 – 0.77	↑
2013	Chardonnay (IGP OC)	0.95 – 1.05	↑	2013	Cabernet-Sauvignon (IGP OC)	0.75 – 0.80	↑
2013	Sauvignon-Blanc (VDF)	0.82 – 0.90	↑	2013	Merlot (VDF)	0.73 – 0.77	↑
2013	Sauvignon-Blanc (IGP OC)	0.85 – 0.92	↑	2013	Merlot (IGP OC)	0.75 – 0.80	↑
2013	Generic Rosé (VDF)	0.72 – 0.77	↑	2013	Syrah (IGP OC)	0.75 – 0.77	↑
2013	Varietal Rosé (IGP OC)	0.80 – 0.90	↑	2013	Dry Muscat (IGP Oc)	0.95 – 1.05	↔

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

BITS AND PIECES

In Languedoc, even though production was up 11% over 2012, the market started quickly at a growing pace for an overall small vintage. This is emphasized by the fact that the available wine inventory is at its lowest since 2001-2002. Buyers are committing quickly for their short/mid-term needs for generic wines and varietal white and rosé wines. Prices for these categories are up compared to last year. However, market prices for generic and varietal reds are still estimates, as most wines are not yet ready to blend and taste. More will be known within the coming weeks, but prices are expected to be on an upward trend.

Regions normally producing VDF Merlot and Cabernet Sauvignon, such as Bordeaux, will have strong needs for these wines from Languedoc, as the Bordeaux production was minimal. This has caused the market to tighten even more.

Traditional white wine producing regions, such as the Loire Valley and Gers, are experiencing difficulties with price negotiation. These difficulties stem from the fact that only small volumes are available in Gers and there is increasing demand in the Loire Valley due to the shortages in other wine regions. Again, more will be known in a few weeks, but prices are expected to be up.

GERMANY – NOVEMBER 2013

TIME ON
TARGET

The second half of the harvest in most wine growing regions of Germany proved to be much more difficult than the first half. The combination of warm and wet weather conditions caused some rot for late harvest grapes such as Riesling and Pinot Noir. Within only a few days, the market went from a good supply situation to a much shorter supply. This is especially true for table wine, which is only available if the yield per hectare forces the growers to sell part of their crop in this contingent category. The estimated annual crush tonnages came down to approximately 1.2 million tonnes, which would be 9% less than the 10 year average.

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 structure of German wine imports during the 12-month period of September 2012 to August 2013 is shown in the table below. It is interesting to note the 20% increase in value and 10.3% increase in volume for white wine. Grape must, partially fermented, increased more than 62% in value and 45% in volume. Meanwhile, sparkling wine and champagne saw decreases in both value and volume.

German Wine Imports					
	Value in Euros	Volume in hectoliters	Euro/hl	% movement Value	% movement Volume
White Wine	684,000	6,378,000	107	20.0	10.3
Red Wine	1,191,000	6,945,000	172	0.7	- 7.2
White + Red Wine	1,876,000	13,323,000	141	7.0	0.4
Fortified Wine	24,000	73,000	330	0.6	- 1.2
Aromatised Wine	36,000	264,000	137	21.3	- 0.8
Sparkling Wine (Champagne...)	351,000	704,000	498	- 10.1	- 10.1
Other Sparkling Wine	129,000	625,000	207	- 1.2	- 8.4
Total Wine	2,416,000	14,988,000	161	3.8	- 0.6
Grape Must, Partially Fermented	7,000	105,000	71	62.5	45.5

Source: German Wine Grower's Association

ITALY – NOVEMBER 2013

TIME ON TARGET

The 2013 harvest is now finished, with the last reds having finished fermentation at the end of October. Due to the large crop, buyers are taking their time with decisions. Italian buyers (bottlers) are not in a hurry to buy wine, as prices change week-by-week. Meanwhile, domestic consumption continues to decrease due to the economic situation. Small and medium-sized bottling companies are pushing as much wine as they can in order to develop any possible export market and balance their loss on the national scale.

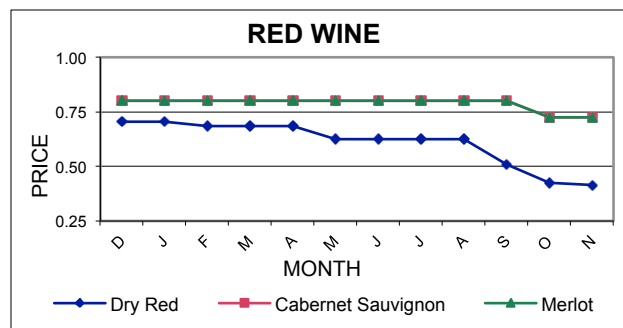
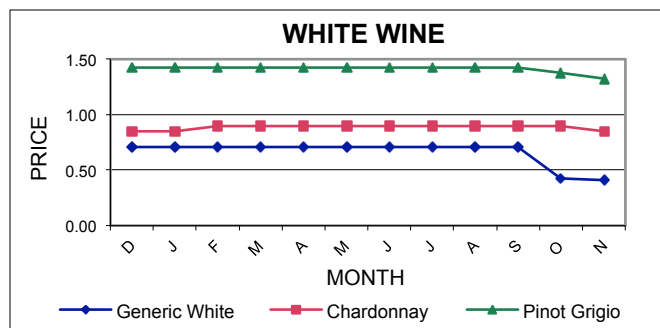
National supermarket chains are already asking suppliers to bring down prices based on future prices, even though these prices are not yet a market reality. Lastly, some wines are not of the best quality, representing a challenge in finding a spot on the international market, especially considering that Spain is still cheaper than Italy. Italian producers are looking to sell their entry-level wines on a quality-value proposition, as many believe the Italian quality is superior to Spanish entry-level product.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.37 – 0.45	↓	2013	Generic Red	0.38 – 0.45	↓
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

Prices have not changed much since last month. Only a few categories have been sold in the last month, including sparkling base wines (high quality) that are interesting German buyers, and Pinot Grigio and Prosecco, where previous buyers came back to secure volumes and qualities without any difference in terms of pricing since last year. Cold fermented white wines and good sparkling base wines are currently 40-60 EUR/L, compared to 60-85 EUR/L seen last year.

It is interesting to note that this year, the rule of 85%/15% for the IGT title has changed, as the 15% must come from the same area of production.

Hopes are that the Amsterdam Bulk Wine Fair will officially launch the start of the 2013 buying campaign!

SOUTH AFRICA – NOVEMBER 2013

TIME ON
TARGET

With the end of the year looming, most wineries and producers are looking at current stock levels and the upcoming 2014 harvest. Stock levels are below that of previous years, mainly due to the earlier and larger volumes of wines already exported since the 2013 harvest. The period from June to August showed record numbers for wine movement out of South Africa compared to any previous 3-month period recorded. Currently, the 2014 harvest is looking very good with favourable growing conditions and good rainfall for the winter months. Some producers are expecting a slightly smaller crop because of the big crops seen over the last two 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	4.50 – 4.75	↔	2013	Generic Red	5.80 – 6.30	↔
2013	Chardonnay	5.85 – 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	4.65 – 6.00	↔	2013	Merlot	6.80 – 8.00	↔
2013	Cultivar Rosé	5.40 – 6.00	↔	2013	Pinotage	6.80 – 7.50	↔
2013	Chenin Blanc	4.60 – 5.10	↔	2013	Shiraz	6.80 – 8.25	↔
2013	Muscat	4.85 – 5.20	↔	2013	Cinsaut	5.85 – 6.30	↔

BITS AND PIECES

Domestic update:

- White wine stock levels for all varietals are extremely low compared to previous years.
- Overall, red wine stock levels are average as per previous years. However, some smaller regions and a few individual wineries show slightly higher stocks of red wine than previous years.
- Domestic sales of wine have grown very slowly over the last few years, mainly due to heavy taxation, high dry goods cost, logistical constraints and large bulk wine exports at good pricing.
- Per capita wine consumption is still very low at approximately 7 liters per person, which equates to about 45% of the natural wine production of South Africa. This is the lowest in any wine producing country in the world. Theoretically, if South Africa were to have the same consumption as a country like the United States with ± 10 liters per person, South Africa would consume 62% of natural wine in South Africa and show a 37% growth. Compared to Argentina at ± 24 liters per person, there would not be enough wine produced to fulfil a need like this.

Exports & International update:

- The first 8 months in 2013 have shown big growth for exports, particularly for bulk wine. Some periods showed growth as high as 75% compared to the same period the previous year.
- Since September, exports have shown higher growth than previous years, but not to the same extent as the first 8 months of 2013. Activity is expected to be more quiet as the end of the year approaches.
- By far the highest growth was seen in dry white and generic rosé programs.
- There were new bulk wine buyers from Spain and Italy; countries that usually don't buy from South Africa.
- There were growing export volumes to Russia, the United States and France.
- Packaged wine exports showed stable growth over the last 12 months.

SPAIN – NOVEMBER 2013

TIME ON
TARGET

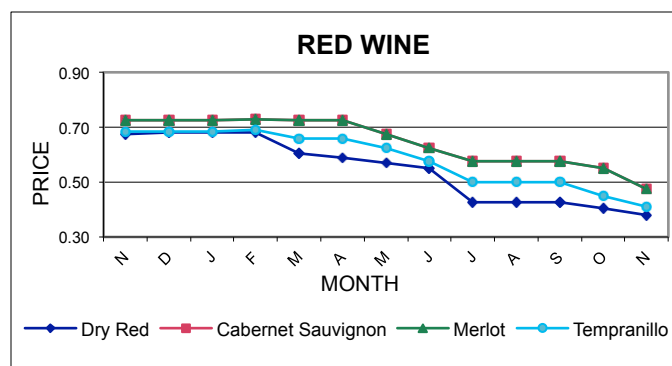
Harvest has come to an end in Spain and the 2013 crop is historically large. While the crop was estimated to be 45 million hectoliters at the beginning of October, authorities have released new estimates for the crop to reach 48.5 million hectoliters, but it is still to be officially confirmed. Due to the high tonnage of grapes, the late harvest and the worsening weather conditions, wine processing has been very complicated for the 2013 vintage. Wineries received large amount of grapes brought in all at once. This caused treatment congestion, crushing delays, cold fermentation capacity issues and storage difficulties. Many big wineries had to rent extra storage facilities, or even use tank trucks as emergency storage solutions.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.33 – 0.40	↓	2013	Generic Red	0.36 – 0.40	↓
2013	Generic Rosé	0.36 – 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	0.40 – 0.42	↓

BULK PRICING OVER TIME



BITS AND PIECES

After a difficult and extremely slow buying campaign start, it now seems that the market is starting to wake up. This is mainly due to the fact that international buyers were waiting for market prices to decrease, awaiting the large estimated harvest.

Market prices have been decreasing week after week, with no registered sales, but now the market is stabilizing. Consequently, wineries are starting to close deals on the European market, but they are mainly short/mid-term commitments.

Spain may see a regain of interest from historical Spanish wine buyers (France, Germany, Russia, etc.) that favored New World supply during the previous buying campaign. The aggressive pricing might now convince these buyers to look to Spain for supply.

BUYER'S CORNER: AUSTRALIA & NEW ZEALAND NOVEMBER 2013

Wine consumption is on the rise, as 1.9% more wine (as pure alcohol) was consumed in reports founded in 2011-2012. This is an increase from 68.0 to 69.3 million liters. This figure equates to the increase from 534.6 to 545.6 million liters of actual wine (versus pure alcohol) that was available for consumption during this period. White wine was most popular, with 48.6% of the total, while red wine was at 36.6%, others at 14.8%.

TABLE 5: WINE, Volume available for consumption

Year ended 30 June	White table wine	Red table wine	Other wines	Total
VOLUME ('000 litres)				
2007	242 814	174 407	76 257	493 478
2008	245 776	173 716	76 124	495 616
2009	255 677	181 931	78 171	515 780
2010	266 599	187 454	85 001	539 055
2011	267 328	185 764	81 496	534 588
2012	275 996	189 479	80 159	545 635
PER CAPITA CONSUMPTION(a) (litres)				
2007	14.62	10.50	4.59	29.72
2008	14.51	10.25	4.49	29.25
2009	14.74	10.49	4.51	29.74
2010	15.07	10.60	4.81	30.48
2011	14.88	10.34	4.54	29.77
2012	15.12	10.38	4.39	29.89

This is in comparison to beer, which reports that beer is at the lowest point of consumption in 66 years, falling 2.3% for the 12-month period. Spirits are also at a low, down 4%, along with RTD (ready-to-drink) beverages down 2.5%. As a total, there were 183.5 million liters of pure alcohol available for Australians to consume during the above period. This figure has reduced slightly (down 0.8%) compared with the year prior. Long-term trends display an increase in the proportion of pure alcohol available for consumption in the wine category increasing from 12% to 38% over a 50-year period (1961-2011).

The level of alcohol consumption peaked in 1974-1975 at 13.1 liters of pure alcohol per person, where it remained constant for the next decade before declining in the mid 90's to 9.8 liters per person. The consumption level then increased again in the mid-late 2000's to 10.6 liters, before steadily dropping to 10.0 liters in recent years. Australia is currently ranked in the top 30 highest alcohol-consuming countries.

Table 1: Per capita consumption of alcohol by country and rank (out of 180 countries), selected countries*

RANK	COUNTRY	PER CAPITA CONSUMPTION†	RANK	COUNTRY	PER CAPITA CONSUMPTION†
1	Luxembourg	15.56	31	Greece	9.01
2	Ireland	13.69	33	USA	8.61
7	Germany	11.99	37	Italy	8.02
8	UK	11.75	42	Japan	7.59
10	Spain	11.68	52	South Africa	6.72
14	France	11.43	63	Sweden	5.96
20	Russian Federation	10.32	70	Thailand	5.59
23	Netherlands	9.68	74	China	5.20
24	New Zealand	9.68	120	Papua New Guinea	1.62
30	Australia	9.02	168	Indonesia	0.09

* Values are for various years before and including 2003

† Per capita alcohol consumption (litres of pure alcohol) among adults

Sources: World Health Organisation, Australian Department of Health, Australian Bureau of Statistics : "Apparent Consumption of Alcohol 2011-2012"



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