



CIATTI

GLOBAL WINE & GRAPE BROKERS

GLOBAL MARKET UPDATE – JULY 2013

VOLUME 4 ISSUE NO. 7

July in the Northern Hemisphere signals the time for winemakers to prepare for another harvest. Despite a recent heat wave, it appears that California will see another large crop. After a record 2012 crop, the producers in California now wonder if they will have enough storage capacity to handle all of the incoming fruit. Europeans are expecting to bounce back from the disappointing volume results in the 2012 harvest year, but weather conditions continue to make it difficult to predict the size of the crop.

The bulk market has seen a shift over the past several months, and buyers continue to see pricing move in their direction. Opportunities seem to be available in most producing markets, and buying activity has increased over the last few weeks. Despite recent reports of global under production, the bulk market appears to have plenty of product available to fill the needs of all brand owners. The market continues to be in balance, with some varietals heading towards a slightly long position. Overall, most markets seem healthy and most buyers and producers speak of the near future with optimism.



CONCENTRATE – JULY 2013

White Grape Juice Concentrate

The United States:

Domestically, there remains a very limited supply of White Grape Juice Concentrate, which will persist until the 2013 harvest in the fall. Some small drum load quantities are available in both Organic and OU Kosher, with pricing in the \$15.00 to \$16.00 per gallon range. We are currently experiencing a very hot dry summer, and while there are some concerns over heat-related crop damage, it does appear that the heat will push the start of harvest up by two weeks. The first crush is set to start in the middle of August.

Argentina:

There is volume of White Grape Juice Concentrate available from a much improved 2013 harvest. Current pricing is in the \$9.75 to \$10.25 per gallon range, CIF Port East and West Coast. A very weak economy and troubling inflation rates continue to cause problems. Argentina is also experiencing one of the biggest snowfalls in decades, snowing heavily over the pass to the ports in Chile. This continues to cause delays in shipments of the finished Grape Juice Concentrate and delays in materials such as drums, flexis and tote bins. Expect global demand for Argentine product to continue well into September.

Red Grape Juice Concentrate

The United States:

Very limited quantities are currently available for Red Grape Juice Concentrate, with red 1000 color almost nonexistent. Some red 500 is available in the \$15.00 - \$16.00 range FOB Plant. Like the generic white grape crop, the Rubired crop is maturing quickly due to the heat. Given there is enough water on the crop and that enough canopy develops, growers are hopeful that they will be able to stave off crop damage.

Chile:

Supply of red 2000 – 4000 color is available, with pricing in the \$17.00- \$22.00 per gallon range, CIF Port West Coast. While this product does not have the stability of the Rubired grape, the quality has been quite good this year. This is becoming a nice alternative until we reach the next harvest year in California.

CURRENT MARKET PRICING

ALL PRICING IN USD PER US GALLON; FCA WINERY:

RED GRAPE JUICE CONCENTRATE		
Country	Price	Trend
California (1000)	15.00 – 16.00	↑
Spain (1000)	18.00	↑
Chile (600)*	14.00 – 15.00	↑
Chile (1000)*	16.00 – 17.00	↑
Italy (1000)	18.00	↑

* Only very limited volumes are currently available

WHITE GRAPE JUICE CONCENTRATE		
Country	Price	Trend
Argentina	9.75 – 10.50	↓
California	15.00 – 16.00	↑

APPLE JUICE CONCENTRATE		
Country	Price	Trend
China	7.50 – 8.50	↓
US	9.00 – 10.00	↓

ARGENTINA – JULY 2013

TIME ON TARGET

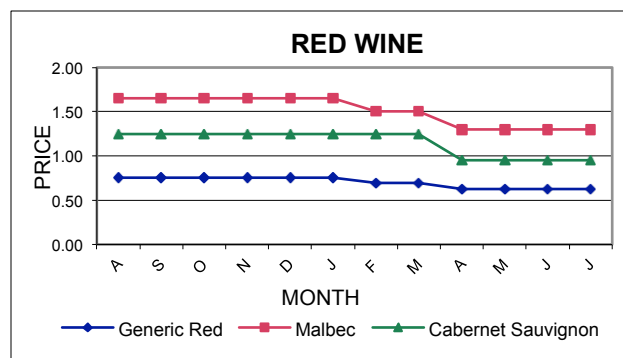
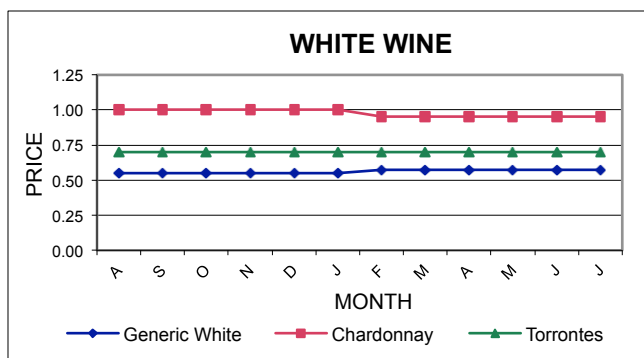
Total exports from January to May 2013 were \$433.6 million and 147.4 million liters, which represents 3% less in value and 22.8 less in volume compared to 2012. The biggest drop is in bulk wine exports, down 47.5%. Meanwhile, case good sales are stable, concentrate demand has been very quiet and exports have dropped more than 20% compared to 2012.

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

The domestic bulk market remains slow, with only small volume sales. Everyday it seems that there are more and more wineries offering wines of excellent quality at good prices.

Regarding international demand, we are seeing requests for varietals from the US and Canada and also from Europe. There are some cheap wines for distillation currently being shipped to Spain.

The poor economic conditions remain, with no changes at the moment. The government is trying to keep it this way until October elections.

AUSTRALIA & NEW ZEALAND – JULY 2013



The latest crush figures have been released for the 2013 harvest:

Australia

2009	2010	2011	2012	2013
1.73 million	1.60 million	1.62 million	1.66 million	1.83 million

Marlborough Sauvignon Blanc

2009	2010	2011	2012	2013
161,000	155,000	206,000	163,000	210,000

CURRENT MARKET PRICING

ALL PRICING IN AUD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
NV	Dry White	0.55 – 0.75	↔	NV	Dry Red	0.70 – 0.80	↔
2013	Chardonnay	0.70 – 0.90	↓	2013	Cabernet Sauvignon	1.00 – 1.25	↓
2013	Sauvignon Blanc	0.80 – 0.95	↔	2013	Merlot	1.00 – 1.25	↓
2013	NZ Marlborough SB	NZ 4.50 – 5.50	↔	2013	Shiraz	1.00 – 1.20	↓
2013	Pinot Gris	0.95 – 1.20	↔	2013	Muscat	0.80 – 0.95	↔

BITS AND PIECES – AUSTRALIA

The 2013 harvest saw a 10% increase to 1.83 million tonnes and is the highest crush since 2008, which was also at 1.83 million tonnes. Total bearing area of vines saw a decline in 2012 to 145,000 hectares, with approximately 3,000 hectares of non-bearing vines. This has decreased from 157,000 hectares in 2009. Grape prices have also seen an improvement in 2013. Red wine grapes increased on average by 13%, while the price for white grapes increased on average by 2%.

The warm inland regions have accounted for approximately 1.1 million tonnes, an increase of 13%. The total crush for red grapes accounted for nearly 52% of the crush, while white grapes crushed fell to 48%. Of the main red varieties, Shiraz, Cabernet Sauvignon and Merlot accounted for 86% of the red grapes crushed. Chardonnay accounted for 45% of the total white grape crush.

One of Australia's most famous and best loved winemakers Peter "PL" Lehmann, passed away at the age of 82 in the Royal Adelaide Hospital. He had been suffering from kidney problems.

BITS AND PIECES – NEW ZEALAND

An estimated 345,000 tonnes were crushed in New Zealand, which is a 28% increase over the 2012 crop. The Marlborough region accounts for almost 75% of the total harvest at 252,000 tonnes. The harvest increased 33% from the short 2012 vintage. Sauvignon Blanc accounted for approximately 68% of the total crush, with Pinot Noir being the second largest varietal at 9.5%. Marlborough Sauvignon Blanc increased to approximately 210,000 tonnes. This is a significant increase from 2012, but as the 2012 harvest was significantly down, this is only an increase of about 2% from the 2011 harvest.

2013 wines are coming onto the market about six to eight weeks earlier than normal. This is because companies are out of stock due to the low crop numbers in 2012, along with increased sales forecasts for Marlborough across the globe.

CALIFORNIA – JULY 2013

TIME ON TARGET

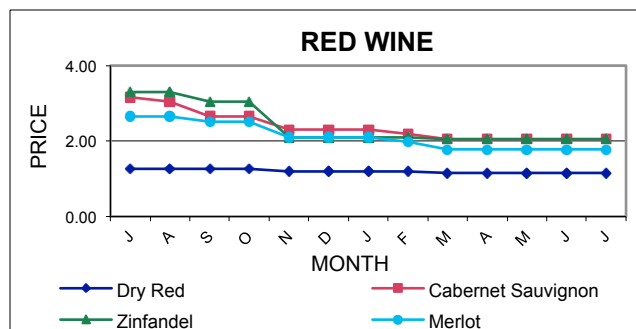
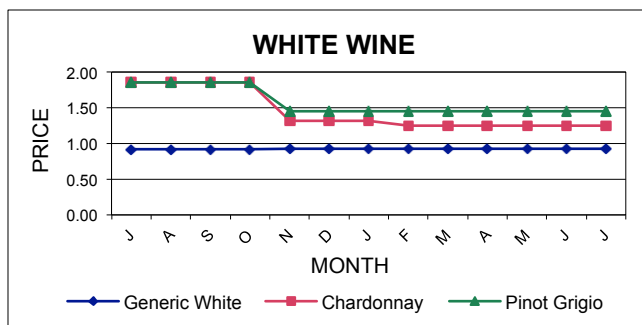
The month of June ended with rain in Northern California. Most coastal counties unexpectedly received more than an inch of rain. This has been followed by a heat wave throughout the state with many days reaching temperatures at or above 100°F / 38° C. The industry will wait to see if this affects what many people believe to be another large crop, similar to that of 2012, or even a bit larger.

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	↓

BULK PRICING OVER TIME



BITS AND PIECES

General spot markets have slowed over the last few months, as producers are cautious about taking on inventory in front of the upcoming vintage. Storage and crushing capacity look to be a major issue this coming season. Wineries and growers are searching to find homes for wines that have yet to sell. Opportunity buys are here, but pricing remains relatively expensive.

The US market continues to grow, led by bottled imports (+9%), California shipments (+4%) and California bottled exports (+12%). Along with the largest wineries dominating this market, we are also seeing positive increases from mid-sized premium wine producers.

Sparkling wine imports, both import and domestic, continue to grow (+10%). However, bulk wine imports have decreased from the historic levels of last year and bulk exports continue to fall.

CHILE – JULY 2013

TIME ON TARGET

The harvest has now finished and expectations are for a bigger crop everywhere. The size of the 2013 harvest will be released at the end of July. In previous weeks, there has been interest from several countries for white wines, generic white (of limited available volume), Sauvignon Blanc and Chardonnay. As red wines are starting to become available, buyers have expectations for the end of July to the beginning of August. New Chilean prices are causing interest from an increasing number of international buyers. Meanwhile, the domestic market remains stable.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FOB PORT:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.55 – 0.79	↑	2013	Generic Red	0.59 – 0.63	↔
2013	Chardonnay	0.80 – 1.10	↔	2013	Generic Red (Basic)	0.52 – 0.58	↔
2013	Sauvignon Blanc	0.78 – 0.95	↓	2013	Cabernet Sauvignon	0.70 – 0.78	↓
2013	Sauvignon Blanc (High Quality)	1.15 – 1.80	↓	2013	Cabernet Sauvignon (Estándar)	0.80 – 0.95	↓
2013	Pinot Noir	0.90 – 1.50	↔	2011 / 2012	Cabernet Sauvignon (High Quality)	1.50 – 4.00	↔
2013	Syrah	0.75 – 0.95	↓	2013	Merlot	0.78 – 1.25	↓
2013	Carmenere	0.78 – 0.95	↓	2013	Malbec	0.95 – 2.00	↔

EXPORT FIGURES

Wine export Figures (Bulk, Bottled & Sparkling)	January-May 2012			January-May 2013			Vol. Var
	MM Lts	M US\$ FOB	Avg Price	MM Lts	M US\$ FOB	Avg Price	%
Bottled	167.6	540.0	3.22	167.5	546.9	3.26	- 0.01%
Bulk	106.2	121.1	1.14	194.5	174.2	0.90	83.08%
Sparkling Wines	1.07	4.4	4.15	1.03	4.2	4.13	- 3.76%
Packed Wines	10.6	21.3	2.02	11.2	23.4	2.08	6.47%
Total	285.5	686.8	2.4	374.33	748.7	2.0	

Bulk exports continue to show an increase (January to May), compared to the same period last year, with 83.08% and 194.5 million liters exported. Bottled wines are showing a decrease of 0.01% and 167.5 million liters in the same period.

BITS AND PIECES

Since June 22, Chile has changed an alcohol law, allowing alcohol products to be called "wine" when alcohol is below 11.5%. This opens a wide range of new products to be sold in Chile and also helps to simplify exports of lower alcohol wines.

	Rain to Date 2013	Average Rain to Date	Rain to Date 2012	+ / - vs. 2012
La Serena	32.6 mm	22.3 mm	0.2 mm	+ 46%
Santiago	130.6 mm	127.4 mm	113.4 mm	+ 3%
Curico	129.8 mm	310.1 mm	297.8 mm	- 58%

FRANCE – JULY 2013



June weather conditions in France and throughout Europe have been unusually wet and cold (especially in Bordeaux, Loire Valley and Burgundy). This is not helping vine development, which remains two to three weeks behind schedule. A couple months ago, everybody was expecting a good crop size due to abundant rains in spring and good budding and blooming. However, many growers are now uncertain as to how the current weather conditions may affect crop size.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2012	Generic White	0.70 – 0.80	↔	2012	Generic Red (VDF)	0.55 – 0.65	↓
2012	Chardonnay (VDF)	0.85 – 0.90	↔	2012	Cabernet Sauvignon (VDF)	0.70 – 0.75	↔
2012	Chardonnay (IGP OC)	0.90 – 1.10	↔	2012	Cabernet-Sauvignon (IGP OC)	0.70 – 0.75	↓
2012	Sauvignon-Blanc (VDF)	0.80 – 0.90	↔	2012	Merlot (VDF)	0.70 – 0.75	↔
2012	Sauvignon-Blanc (IGP OC)	0.82 – 0.90	↔	2012	Merlot (IGP OC)	0.70 – 0.75	↓
2012	Generic Rosé (VDF)	0.65 – 0.75	↔	2012	Syrah (IGP OC)	0.67 – 0.75	↓
2012	Varietal Rosé (IGP OC)	0.72 – 0.80	↔	2012	Dry Muscat (IGP Oc)	0.95 – 1.05	↔

BITS AND PIECES

Market activity remains unbalanced, with rosé (generic/variety) seeing the first signs of market tightness. There is a very limited availability on varieties (Grenache and Syrah) and generics are selling at higher prices. The white generic and varietal market is behaving similarly, but with slightly more stock. However, big producers and negociants are holding nine months worth of wine in order to cover their needs before the 2013 vintage.

The situation is more complicated for red generic and varieties, as available inventory is still too ample for the season. Consequently, we are seeing a quick and important price drop on every red segment (IGP and VDF).

Following the final agreement on the Common Agricultural Policy (PAC) concluded by end of June between the European Parliament, European Commission and the Council of European Agriculture Ministers, French and European producers are finally reassured about the protection of the Planting Rights regulation system, which will remain until 2030. The system will still regulate vineyard plantings for all the categories of wines, with a maximal increase of plantation authorizations fixed to 1% per year, and with more power given to the professional organizations in the plantation rights management.

GERMANY – JULY 2013



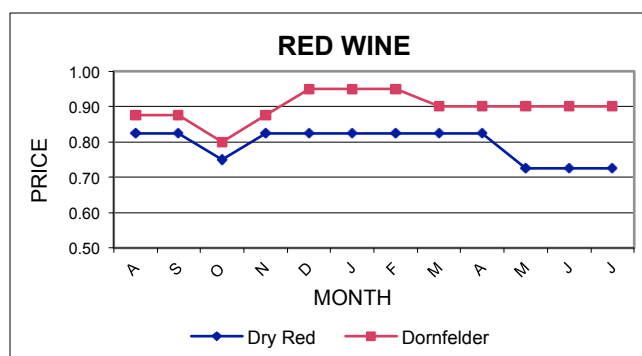
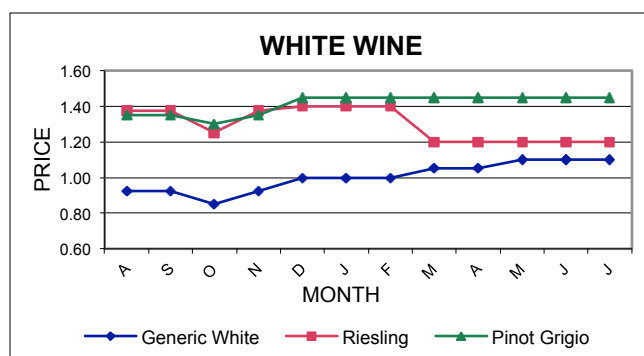
Flowering is now mostly complete throughout Germany. The current weather conditions are favorable and will help make up for the late start of the season. Harvest will begin later than usual this year; it is still too early to assess quality and quantity of the harvest. The bulk market currently remains quiet in Germany. The slight price softening for Riesling came to an end and prices are slightly up again.

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	↔

BULK PRICING OVER TIME



BITS AND PIECES

Germany has seen a downward trend in the consumption of alcoholic beverages since 2006. The consumption of wine and sparkling wine have increased, while beer and spirits have seen a decrease.

Annual Beverage Consumption in Germany (in liters per capita)	2005	2006	2007	2008	2009	2010	2011	2012
Beer	115.3	116.0	111.8	111.1	109.6	107.4	107.2	105.5
Wine	19.9	20.1	20.6	20.7	20.1	20.5	20.2	20.4
Sparkling Wine	3.8	3.8	3.8	3.9	3.9	3.9	4.1	4.1
Spirits	5.7	5.7	5.6	5.5	5.4	5.4	5.4	5.4
TOTAL Alcoholic Beverages	144.7	145.6	141.8	141.2	139.0	137.2	136.9	135.4

ITALY – JULY 2013

TIME ON TARGET

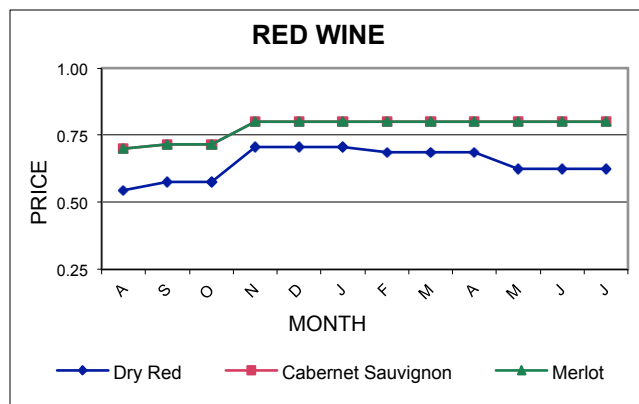
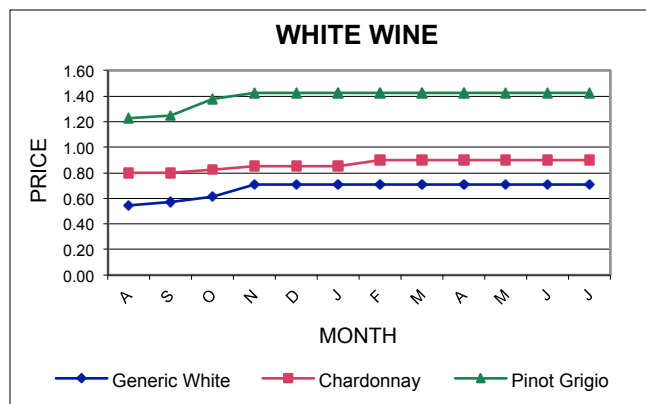
Figures for the 2012 Italian vintage come as unexpected. Instead of this being the lowest crop as initially forecasted (+/- 40 million hectoliters), the 2012 crop should be around 45.6 million hectoliters according to AGEA and 44.4 according to Corriere Vinicolo. If these figures are correct, Italy would be the largest wine producing country in the world.

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	0.59 – 0.66	↓
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

Vineyard surface area figures have been released for 2012. Overall, about 9,000 hectares were lost this year. The following regions saw a decrease in vineyard surface area in 2012:

- 4,000 hectares in Sicily
- 2,500 hectares in Piedmonte
- 2,000 hectares in Emilia Romagna
- 1,700 hectares in Sardegna

Known for producing Prosecco and sparkling wine, the following regions planted vines in 2012:

- + 1,400 hectares in Veneto
- + 800 hectares in Friuli

Export sales were very good for the first trimester this year, mainly driven by the sparkling wine category.

SOUTH AFRICA – JULY 2013



A cold and wet winter starts off the post-2013 harvest period with promising conditions for 2014. The South African Rand continues at a low of R10.00/US\$, R13.07/€ and R15.24/UK£. Large volume export shipments of generic white and rosé continue. In total, exports of bulk wine increased 56.9% and exports of packaged wine decreased 3.5% for the period June 2012 to May 2013. Overall, this shows an increase of 28.6% over the last 12 months. Domestic natural wine sales increased by 1.4% during the same period.

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

BITS AND PIECES

Huge volumes of generic white and rosé (made with white grapes) continue to ship, but concern is growing for the slow sales for generic red wine and all varietal wines used in generic white wines (with Chenin Blanc and Colombard being the exceptions).

Overall, producers remain positive for continued growth in export sales, fueled by the continued weak Rand against other major currencies, and are largely ignorant of a potential large 2013 crop in Europe, especially in Spain and the South of France.

A general South Africa fuel increase of +/-7.5% is looming, which could push general inflation from just below current 6% to almost 7% within a short period of time, adding further pressure to a struggling South African economy and currency. This is not ideal for a country with a population of 52 million people and an unemployment rate already at 25.2%.

Ex-president and national hero Nelson Rolihlahla Mandela, who turns 95 years old on July 18, has remained in the hospital since he was admitted three weeks ago for a critical lung infection. “Madiba”, as he is fondly referred to by all South Africans, is the name of the Thembu clan of the Xhosa tribe, to which Mr. Mandela belongs. It is considered an act of honor to refer to somebody by the name of his tribe and clan.

Producer Cellars in South Africa	2003	2010	2011	2012
Co-Operative Style Cellars	66	54	52	50
Private Wine Estates	423	493	505	509
Wholesaler Producers	16	26	25	23
TOTAL	505	573	582	582

SPAIN – JULY 2013

TIME ON TARGET

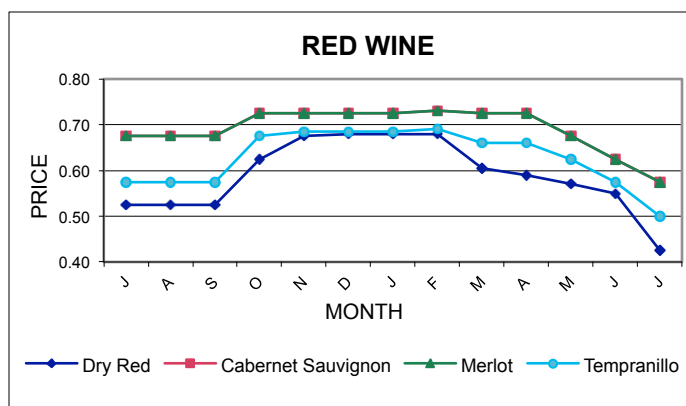
The Spanish bulk market experienced a rebound of activity over the month of June, due to a downward pricing trend. This low activity over the last month, combined with important unsold inventories, has led to Spanish producers having no choice but to sell their wines at low prices in order to empty the cellars before harvest. Prices are decreasing weekly for every category. This has created buying opportunities for new buyers, but has also negatively affected long-term relationships with buyers who committed at high prices in December 2012 to January 2013.

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

At this time, it is being predicted that most wineries will not be able to sell 100% of the available stock. Therefore, everybody is looking at external storage solutions in order to prepare for the upcoming harvest.

In terms of market perspective, if the 2013 harvest is of good size as expected, this should lead to a softening towards the beginning of the buying campaign, as Spain will carry a year and a half worth of inventory.

BUYER'S CORNER: EUROPE - JULY 2013

THE NETHERLANDS

For the last 50 years, wine consumption in the Netherlands has been characterized by growth. From 1959 to 2012, the average liters consumed by Dutch citizens has increased from 1.6 to 21.8 liters per person per year. This equals an average annual increase of about 5.5%. Almost 20% of Dutch citizens drink wine on a daily basis. This increase in consumption is accompanied by other developments in the Dutch wine market, such as an increased level of wine education (*Productschap Wijn*). Furthermore, due to the globalization of the wine market, New World wines have acquired a fixed place on the shelves.

French wines remain the number one selling origin with 34% market share, followed by South Africa with 17% market share. Chilean wines are also gaining ground in the Netherlands. Spain and Italy represent 10% and 9% of market share, respectively.

The average price of wine is EUR 2.54 per bottle.

	Market Share by Volume	Market Share by Value
Red Wine	52%	54%
White Wine	35%	34%
Rosé Wine	13%	12%

FRANCE

Traditionally, French buyers were buying generic wines for their aromatized wines products in Spain and/or Italy. Due to the market conditions seen this year in these countries, some have decided to pursue New World countries (Chile for red wines and South Africa for white and rosé wines).

On the national and local scale, buyers had to purchase earlier than normal (around December last year), as the 2012 vintage was a smaller vintage than that of 2011. Due to the economic situation and the unstable European climate conditions, buyers are holding. Therefore, wine volumes that have not been loaded remain in cellars, which is especially true for red wines.

Summer seems to have started in the last few days. There has been some movement regarding rosé and white wine. Most of the rosé wine has sold and already been loaded.

The trend is now to go back to Spain, where prices recently decreased.

SPAIN

The buying campaign started with prices at a rather high level. Some big companies sourced outside of Spain in order to supply their markets, which did not require particularly Spanish wines, but rather generic and varietal wines without a specific origin.

Since the market in Spain recently offered good opportunities in terms of volume and price with quick loadings, the buying market currently remains active.

ITALY

Italian buyers are looking forward to Spanish pricing for the 2013 crop, with particular interest in Spanish grape musts.



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