



CIATTI

GLOBAL WINE & GRAPE BROKERS

GLOBAL MARKET UPDATE – NOVEMBER 2014 VOLUME 5 ISSUE NO. 11

The harvests have all come to an end in the Northern Hemisphere, and it looks as though France has regained its position as the largest producer in the world. French growers looked to have rebounded from disappointing volume results in 2013 with a much better looking crop in 2014. While all regions did not participate in the gain, as Languedoc notably did not have large output, the French growers overall are feeling good about the size of the harvest. The second factor allowing France to regain its status as top producer is the size of the harvest in Spain. The Spanish harvest is down measurably from 2013, and this decrease in volume seems to have helped balance the previous over-supply situation. Quality and volume both seem to be an issue in Italy, as adverse weather conditions have caused for a very difficult harvest in 2014. California growers agree that the crop this year is a good one, but not nearly the size of the record crop from the previous year.

Many producers in the Southern Hemisphere are now nearing the end of the frost season, and despite some reports of frost, no major damage is expected from the larger production regions. While it is still very early for harvest estimates, most areas are reporting normal growing seasons thus far.

The bulk market continues to move forward, and many players will meet in Amsterdam in the coming days. Please come visit the Ciatti stand at the show, and we look forward to seeing those of you who will attend.



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ARGENTINA – NOVEMBER 2014

TIME ON TARGET

We are almost through the dangerous frost season in Argentina. So far, there have only been very small amounts of frost damage, and the season could be described as normal. As always, the hail season will determine the outcome of this year's harvest, and we can only wait and hope for good results. The OIV is holding its congress in Mendoza at this time, and the local suppliers welcome the wine world to Argentina.

Despite continuing tough economic conditions, Argentine suppliers remain resolute. The people at ProMendoza have put together several promising economic trade tours, and the recent visit to the US has allowed for several new opportunities for export.

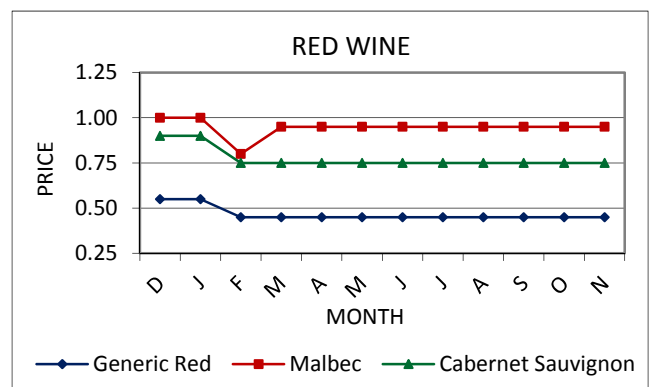
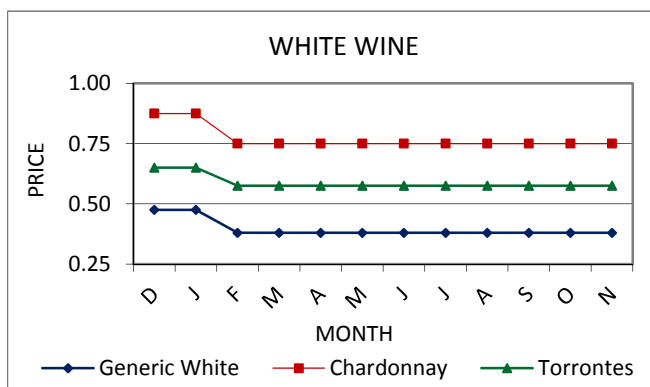
The concentrate market has been slow to move, and therefore there is now plenty of juice concentrate available, and prices are attractive to most buyers. Bulk exports continue to lose in volume, mainly due to lower demand for Argentine generic wine, but Malbec sales continue to show strength.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FCA WINERY:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2014	Generic White	0.37 – 0.39	↔	2014	Generic Red	0.40 – 0.50	↔
2014	Generic White (Criolla)	0.33 – 0.35	↔	2014	Cabernet Sauvignon	0.65 – 0.85	↔
2014	Chardonnay	0.65 – 0.85	↔	2014	Malbec	0.90 – 1.00	↔
2014	Torrontes	0.55 – 0.60	↔	2014	Malbec Reserva	1.00 +	↔
2014	Chenin Blanc	0.45 – 0.50	↔	2014	Syrah / Merlot	0.65 – 0.85	↔
2014	Muscat	0.50 – 0.55	↔	2014	Bonarda / Tempranillo	0.50 – 0.60	↔

BULK PRICING OVER TIME



AUSTRALIA & NEW ZEALAND – NOVEMBER 2014

TIME ON TARGET

Summer is well and truly on its way, as wine growing regions around Australia have seen increased temperatures in recent weeks. A spate of frosts has hit the Barossa Valley region again for the third year in a row with speculation on another reduced yield for 2015. Other regional areas such as the Clare Valley and Padthaway were also affected due to the cold snaps and dry conditions.

CURRENT MARKET PRICING

ALL PRICING IN AUD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
NV	Dry White	0.45 – 0.65	↓	NV	Dry Red	0.60 – 0.75	↓
2014	Chardonnay	0.55 – 0.75	↓	2014	Cabernet Sauvignon	0.75 – 1.05	↓
2014	Sauvignon Blanc	0.75 – 0.90	↔	2014	Merlot	0.70 – 0.90	↓
2014	NZ Marlborough SB	NZ 3.00 – 3.90	↓	2014	Shiraz	0.75 – 1.00	↓
2014	Pinot Gris	1.05 – 1.30	↔	2014	Muscat	0.65 – 0.80	↓

BITS AND PIECES – AUSTRALIA

The Wine Equalisation Tax rebate continues to be high on the agenda of the Australia Tax Office as they look increase audits on producers in the wine industry. The WET system offers suppliers a 29% rebate from the government for goods that are sold domestically – a system introduced for smaller wineries to maintain competitiveness. The ATO is reporting they have an estimated saving of AUD \$30 million from repaid claims and fines from those who have made unlawfully claims.

Australia currently exports 688 million litres of wine valued at AUD \$1.78 billion. The recent figures released show an increase in volume by 0.7% with total value remaining steady. The average value of bulk exports has dipped slightly with as we see continue to see exporters shipping their wine offshore to be bottled at the destination. The decline of exported bottled goods by 7% in the past 12 months has been offset by the same percentage increase in bulk shipments; a slower rate of decline assuming the ratio may be stabilising. Bottled goods are increasing in value to AUD \$4.83/L as we see more export markets consuming premium wine which is further propelled by the lower Aussie dollar.

Source: Wine Export Approval Report – September 2014

BITS AND PIECES – NEW ZEALAND

Australia's largest supermarket chain has bought into Marlborough's wine industry. Pinnacle Drinks, a subsidiary of grocery giant Woolworths Ltd, are the new owners of Marlborough wine company Isabel Estate Vineyard. Family-owned Isabel Estate Vineyard and two other entities, Isabel Estate Partnership and Shelby Estate Ltd, which together trade as Isabel Estate, went into receivership in July after racking up more than \$12.4 million in debt.

CALIFORNIA – NOVEMBER 2014

TIME ON TARGET

With crush finally finished, the assessment and sourcing period of our brokers begins. Early indications have the 2014 vintage showing superior quality continuing for a third straight year. Weather conditions held throughout the fall, allowing wineries to harvest fruit at optimal maturity. Volumes were plentiful in most regions, but below the massive 2013 harvest.

Pinot Grigio will remain tight given strong demand, along with no apparent increase in new tonnages. Both Zinfandel and White Zinfandel supplies have balanced due to decreased yields in most California vineyards. Reports on Chardonnay, Pinot Noir and Cabernet Sauvignon all show average grape deliveries and excellent quality in all growing districts. Cabernet Sauvignon from the coastal regions will remain tight and in demand. Buyer activity has begun, and suppliers are looking to finish wines for the upcoming buying season.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.55 – 0.80	↓	2013	Generic Red	0.75 – 1.00	↓
2012 / 2013	Chardonnay	0.90 – 1.18	↓	2012 / 2013	Cabernet Sauvignon	1.25 – 1.98	↔
2013	Pinot Grigio	1.45 – 1.72	↔	2013	Merlot	1.05 – 1.45	↓
2012 / 2013	Muscat	0.85 – 1.32	↓	2013	Pinot Noir	1.72 – 2.25	↔
2013	White Zinfandel	0.30 – 1.00	↓	2013	Syrah	1.10 – 1.40	↔
2013	Colombard	0.75 – 0.85	↔	2012 / 2013	Zinfandel	1.05 – 1.75	↓

BITS AND PIECES

Sales trends continue to be mixed. Reported sales through the summer months have domestic wines growing, while imported wines have fallen. Overall, wines total wine sale within the US are basically flat year to date. Hopefully, the fourth quarter (OND) sales will rally with promising results. Domestically, the mid-priced category of wines (\$10-20 per bottle) have grown considerably over the past year. This trend is tempered by volume decreases in wines in lower price points. Consumers continue to have many options and choices for their alcoholic beverage needs.

California vineyards continue to see change. Generic varieties, mainly Thompson Seedless, are being removed in the central valley, due to lack of demand and the unsustainable pricing offered this season. In the northern interior and coastal regions of California, there are several new plantings of key varieties, including a lot of Cabernet Sauvignon, throughout the summer. More deliveries are set for next spring. These planting and the ones from the past few years will start to bear fruit next season, 2016 and beyond.

CHILE – NOVEMBER 2014

TIME ON
TARGET

Prices continue to be stable. The currency exchange rate remains in the +/- \$ 580 – 590 pesos per US dollar range. Both domestic and international demand have seen fluctuations, with the exception of Chardonnay, which has seen demand since the low inventories.

Chile should have passed the period of frost risk, having had only one event with low to medium impact for Chile (October 10th), but with big damage for the affected areas. Damaged varieties included Sauvignon Blanc and Pinot Noir, and most affected was Chardonnay. Fruits like cherries, kiwis, apples and pears were also affected.

2015 grape purchases continue to be stable to active, especially for high quality grapes, driven by the increase in exports for quality and value wines.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FOB PORT:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
NV	Generic White	0.62 – 0.70	↔	NV	Generic Red	0.49 – 0.55	↔
2014	Chardonnay	1.00 – 1.25	↔	2014	Cabernet Sauvignon (Basic)	0.50 – 0.57	↔
2014	Sauvignon Blanc	0.87 – 1.15	↔	2014	Cabernet Sauvignon (Standard)	0.60 – 0.75	↔
2014	Pinot Noir	0.90 – 1.50	↔	2012/2013	Cabernet Sauvignon (High Quality)	1.50 – 4.00	↔
2014	Syrah	0.55 – 0.75	↔	2014	Merlot	0.60 – 0.75	↔
2014	Carmenere	0.55 – 0.70	↔	2014	Malbec	0.73 – 2.00	↔

EXPORT FIGURES

Wine export Figures (Bulk, Bottled & Sparkling)	January – August 2013			January – August 2014			Volume
	Million Liters	Million US\$ FOB	Average Price	Million Liters	Million US\$ FOB	Average Price	Variance%
Bottled	308.61	1,015.95	3.29	330.71	1,111.28	3.36	7.16
Bulk	322.85	279.23	0.86	233.97	192.93	0.82	-27.53
Sparkling Wines	2.11	8.89	4.21	2.56	10.89	4.26	20.96
Packed Wines	20.15	40.33	2.00	18.81	36.83	1.96	-6.66
Total	653.73	1,344.40	2.59	586.03	1,351.93	2.60	-10.36

FRANCE – NOVEMBER 2014

TIME ON TARGET

With the small 2014 European harvests, France has gained back the title of biggest world producer with 46.2 million hectoliters produced in total, a 10% increase overall compared to the small 2013 crop. While there was an increase overall, results are contrasted depending on the region. The production increase was mainly located in the AOP producing regions (Bordeaux, South West, Cotes du Rhone, Provence), whereas the production in Languedoc is down to 10% compared to last year (see table below).

This small crop, combined with carry over stock levels close to zero, resulted in a buying campaign that began very quickly at a high pace and high pricing, with already a potential shortage on specific varietals.

	2011	2012	2013	2014 (est.)	2014 vs. 2013 (%)
Pyrénées Orientales	1,018	683	757	818	8
Herault	5,879	4,652	5,593	4,558	- 18.5
Aude	4,336	3,462	3,832	3,257	- 15
Gard	3,493	3,154	3,122	3,381	8.3
TOTAL Languedoc	14,726	11,951	13,304	12,014	- 9.7

Source: French Customs

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2014	Generic White (VDF)	0.90 – 0.95	↑	2014	Generic Red (VDF)	0.77 – 0.80	↑
2014	Chardonnay (VDF)	1.20 – 1.30	↑	2014	Cabernet Sauvignon (VDF)	0.85 – 0.90	↑
2014	Chardonnay (IGP OC)	1.20 – 1.30	↑	2014	Cabernet Sauvignon (IGP OC)	0.88 – 0.95	↑
2014	Sauvignon Blanc (VDF)	0.95 – 1.15	↑	2014	Merlot (VDF)	0.85 – 0.90	↑
2014	Sauvignon Blanc (IGP OC)	1.00 – 1.20	↑	2014	Merlot (IGP OC)	0.88 – 0.95	↑
2014	Generic Rosé (VDF)	0.85 – 0.95	↑	2014	Syrah (IGP OC)	0.88 – 0.95	↑
2014	Varietal Rosé (IGP OC)	0.95 – 1.00	↑	2014	Dry Muscat (IGP OC)	1.00 – 1.20	↔

BITS AND PIECES

Chardonnay is the hardest varietal to find, as it suffered the most from winter drought and bad flower set. It is believed that good quality Merlot and Syrah will soon be difficult to find.

Most of the big cooperatives in southern France have seen their allocation to historic clients reduced, and are unfortunately unable to supply to prospect markets. International buyers are strongly advised to cover their annual needs now, as most of the quality varietal wines could be sold out within the coming months. This is true for Chardonnay, Sauvignon Blanc, varietal rosé, Merlot and Syrah (with good color and alcohol degree).

GERMANY – NOVEMBER 2014



Shown in detail below, estimates for the 2014 European grape harvest show Germany with the highest yield increase over last year. Expectations are for a 9.4 million hectoliter 2014 harvest. This would be up 11% from last year and 7% above average over the last five years. Usually this would lead to price softening. However, prices remain stable and are even increasing for some varieties, such as Dornfelder. Dornfelder prices have already increased € 0.20 per liter compared to pre-harvest pricing.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013/2014	White Wine	1.00 – 1.20	↔	2013/2014	Red Wine	0.65 – 0.80	↔
2013/2014	Pinot Grigio	1.40 – 1.60	↔	2013/2014	Dornfelder	1.05	↑
2013/2014	Riesling	1.00 – 1.50	↔	2013/2014	Pinot Noir	1.20	↔

BITS AND PIECES

2014 European Harvest Estimates

	5-yr average 2008-2013 (millions of hl)	2012 (millions of hl)	2013 (millions of hl)	2014 (millions of hl)	2014 vs. 5-year average (%)	2014 vs. 2013 (%)
France	45.0	41.4	44.1	45.0	--	+ 2
Italy	49.4	43.4	46.4	41.0	- 17	- 12
Spain	40.9	35.8	50.6	40.8	--	- 19
Germany	8.8	9.1	8.4	9.4	+ 7	+ 11
Portugal	6.1	6.3	6.2	5.9	- 4	- 6
Romania	5.0	3.6	5.9	4.1	- 18	- 31
Hungary	2.6	1.8	2.6	2.7	+ 5	+ 4
Greece	3.2	3.1	3.7	2.7	- 17	- 28
Austria	2.4	2.2	2.2	2.2	- 8	--
Bulgaria	1.4	1.3	1.3	1.2	- 11	- 6
EU 28 TOTAL	168.0	151.0	174.9	157.7	- 6	- 10

ITALY – NOVEMBER 2014

TIME ON TARGET

The market is still slow to start for most international contracts, compared to previous years. The total acidity was really high in 2014 Pinot Grigio, which caused most suppliers to spend more time working on the wines in the cellars. Nevertheless, a big gap in quality still exists on the market, causing interest in the good quality 2013 material. The Prosecco demand remains very high, and suppliers are currently working to reduce or cancel contracts with their distribution clients. The current supply shortage is not a result of the size of the 2014 harvest, but rather the relatively low inventory carried through the summer months. The US and UK markets remain very big drivers of the current demand.

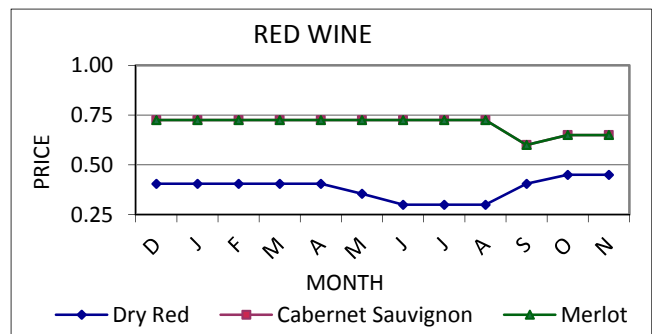
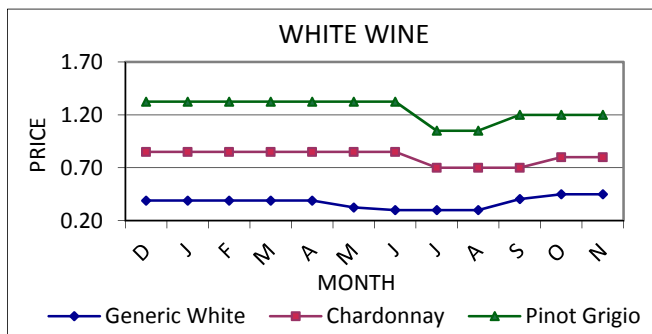
CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2014	Generic White	0.40 – 0.50	↔	2014	Generic Red	0.40 – 0.50	↔
2014	Chardonnay	0.75 – 0.85	↔	2014	Cabernet Sauvignon	0.60 – 0.70	↔
2014	Pinot Grigio	1.10 – 1.30	↔	2014	Merlot	0.60 – 0.70	↔
				2014	Primitivo	0.95 – 1.20	↔

* Please note: The prices stated above are 2014 price estimates

BULK PRICING OVER TIME



BITS AND PIECES

UIV has announced that 48.161 million hectoliters of wine were produced in 2013 and 40.911 million hectoliters for 2014. This comes after OIV published 52.429 mhl for 2013 and 44.424 mhl for 2014.

On a world scale, with a forecasted production of 271 million hectoliters for 2014 (down 6% compared to 2013), the gap between the consumption (forecasted high at 248.6 mhl and low at 237.6 mhl) should be around 28 million hectoliters (it was almost 48 mhl in 2013).

Sources: OIV and Union Italiana Vini, October 2014 report on world production

SOUTH AFRICA – NOVEMBER 2014



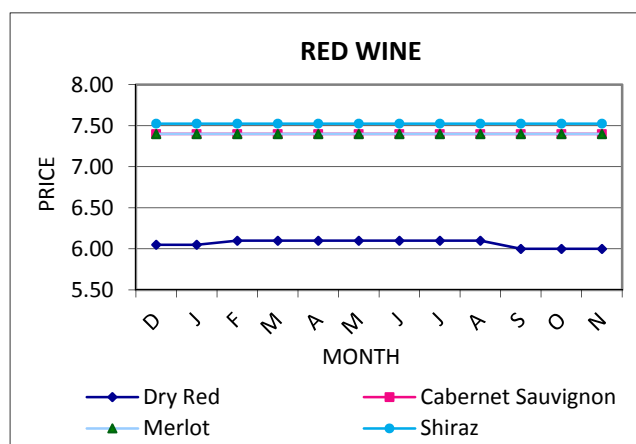
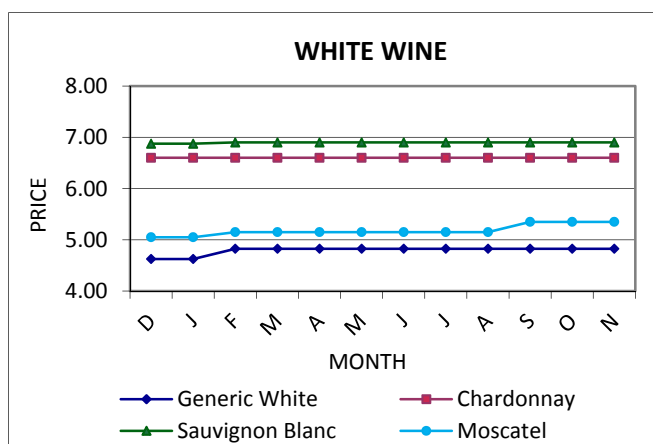
With only 5-6 weeks until Christmas, warmer weather is very evident in South Africa, entering into its summer period. At this stage, the vines are looking very good in all areas after a very good and wet winter rainfall. Most wineries, wine-related companies and most importantly the department of Agriculture will be short staffed from 16 December to 5 January as the summer holiday season and Christmas period starts.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2014	Generic White	4.65 – 5.00	↔	2014	Generic Red	5.70 – 6.30	↔
2014	Chenin Blanc	4.75 – 5.20	↔	2014	Cabernet Sauvignon	6.80 – 8.00	↔
2014	Sauvignon Blanc	6.00 – 7.80	↔	2014	Ruby Cabernet	6.00 – 6.30	↔
2014	Chardonnay	5.95 – 7.25	↔	2014	Merlot	6.80 – 8.00	↔
2014	Muscat	5.00 – 5.70	↔	2014	Pinotage	6.50 – 7.50	↔
2014	Generic Rosé	4.85 – 6.00	↔	2014	Shiraz	6.80 – 8.25	↔
2014	Cultivar Rosé	5.70 – 6.60	↔	2014	Cinsaut	5.90 – 6.30	↔

BULK PRICING OVER TIME



BITS AND PIECES

The export market on bulk and packaged wine has seen no significant changes in the last two to three months. There is some renewed interest in South African wine at this stage, mostly for wine shipping from January 2015, meaning part 2014 vintage and part 2015 vintage.

The stock levels at wineries are still fairly high for this stage of the year, especially on red varietals. Wineries are confident with the quality of wine remaining at wineries. About four months remain until the start of the 2015 harvest.

SPAIN – NOVEMBER 2014

TIME ON TARGET

Given the smaller European crop overall, European and international buyers are looking to Spain. Purchases out of Spain are expected to increase: 1 million hectoliters for France, 2 mhl for Italy, 1 mhl for Portugal, 1 mhl for remaining international buyers. The latest 2014 crop estimates have been confirmed at 40 million hectoliters by both the Spanish Ministry of Agriculture and growers/cooperatives. White grapes are expected to be down about 20-30% from last year and red grapes down 30-50%.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2014	Generic White	0.30 – 0.35	↑	2014	Generic Red	0.32 – 0.36	↑
2014	Generic Rosé	0.30 – 0.35	↑	2014	Cabernet Sauvignon	0.45 – 0.50	↑
2014	Moscatel	0.60 – 0.65	↑	2014	Merlot	0.45 – 0.50	↑
2014	Syrah	0.42 – 0.50	↑	2014	Tempranillo	0.35 – 0.40	↑

* Please note: The prices stated above are 2014 price estimates

BITS AND PIECES

There are no shortages expected for generic white wines, but the carryover stock before the next harvest should become balanced after the 2013-2014 buying campaign. The only concerns could be the lower than average alcohol degree on generic white wines and the low availabilities on international varietals, which are gaining interest from outside buyers, since France has increased pricing on varietals such as Chardonnay and Sauvignon Blanc.

For Spanish red wines, La Mancha overall is facing a tighter situation, as the crop is lower for red grapes. The southern sub-regions (Machuela) and outside areas (Levante, Alicante, Utiel-Requena, Murcia) faced the most significant decrease (down 50-70%), due to drought and stopped development. Demand remains strong for high color material (wine, RGJC) and international varietals (Merlot, Cabernet, Syrah, Grenache). Buyers are strongly encouraged to commit for their annual needs as there is already potential tension on Merlot.

The situation for rosé wine lies somewhere in between that of white and red wine. There is strong demand, mainly from French buyers looking to make up for the volume decreases in Languedoc. Controlled fermentation wines, generics and varietals (Syrah, Grenache, Cabernet) are seeing the most demand, especially those with pale color and good pH. Like with red wines, there is uncertainty regarding available inventories throughout the year, so buyers are encouraged to commit for their annual needs.

The grape juice concentrate market should see a steady increase in the coming month, as the lower 2014 crop forced growers to produce less, in favor of still wines.

A huge 2013 vintage inventory, combined with very low prices at the end of the buying campaign, increased Spanish wine exports by more than 24% during the first eight months of 2014.

BUYER'S CORNER: AFRICA

NOVEMBER 2014

- The African market comprises 54 countries, a population exceeding a billion people, with a fast-growing middle class, resulting in vastly increased buying power.
- Statistical projection shows people aged between 18-24 should almost double to well over 200 million with an estimated working-age population of 1.2 billion by 2020 and an expected 165 million new 20-40 year olds within the next 1.5 decades.
- 7 African countries are amongst the 10 fastest growing economies in the world between 2010-2015.
- Africa is an estimated 65 million cases market, currently supplied largely by South Africa with still wine, while some traditional regions favor French, Spanish and Portuguese products.

ECONOMICS & RETAIL

- Africa has historically been retail-hampered by lack of commercial accessibility for large portions of its rural population. Practical retail and financial access was extremely difficult, with the majority of the population not owning a bank account. The global mobile and Internet revolution have vastly revolutionized financial and retail access for the African population.
- On an informal level, mobile airtime has become an African commercial currency, with users buying and transferring airtime to other users, often cross-border (in most cases the same mobile service providers operate in numerous African countries – i.e. one network). The receiving users can then resell that airtime to “airtime traders”, who will buy that airtime at a discount and resell at a small margin to other users.
- Mobile Apps have become the key driver of retail and financial transactions in Africa, with many large organizations already rolling out various transactions and services across the board.
- South African retailer Shoprite Checkers (with branches in various African countries) launched their Eezi Coupon App, with which users have access to both retail information and redeemable mobile coupons, to be used at their stores’ point of sale.
- In South Africa, retail group Pick ‘n Pay and mobile network provider MTN introduced Mobile Money, which allows their clients/shoppers to transfer funds through any cell phone number in South Africa, enabling the user to pay for items and services, as well as withdrawing and depositing cash at their participating outlets.
- Internet and retail applications have exposed and given former rural populations access to global information, exposing the user/buyer to previously unknown and inaccessible Western luxury items and leading to huge demand increase for such goods.
- This has enabled them to become more product and price aware and has started to create “brand awareness” in the African market.

EBOLA

- The 2014 Ebola epidemic is the largest in world history, affecting multiple countries, especially West Africa. According to the 22 October 2014 *World Health Organization Report*, the number of total cases was 9,936 with 4,877 deaths.
- Cases continue to increase exponentially in Guinea, Liberia, and Sierra Leone, and the situation there remains of great concern. The outbreaks in Nigeria and Senegal were declared “over” as of 20 October and 17 October, respectively. Cases in Spain and the US have since occurred.
- The Ebola constraint on travel has radically affected all commercial activity over a vast number of industries in West Africa, including retail, tourism and even sport.
- The African Cup of Nations football tournament is scheduled to start mid-January 2015, but initial host Morocco refuses to host the 16-team event and wants it postponed until 2016 because of Ebola. Four possible stand-in countries (South Africa, Sudan, Egypt and Ghana) have also indicated they are not willing to host. The situation remains unresolved.



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