



CIATTI

GLOBAL WINE & GRAPE BROKERS

GLOBAL MARKET UPDATE – JULY 2014 VOLUME 5 ISSUE NO. 7

While the world has cheered, cried, yelled, screamed and held its collective breathe during the 2014 FIFA World Cup, we at Ciatti have not been immune to the fever of this year's play. The verbal rivalry between countries has been, well, somewhat less than reserved and in some cases downright bitter.....but then again, the most ardent of them was from Canada.

The bulk market has been much the same. Inventories are, in general, available from around the world, so the competitive spirit is alive and well on the brokering front to get as many people the wines they need from around the world. Higher-end wines have fared better during this time, while more commercial areas still have a ways to go in order to work through the 2012 and 2013 inventories that are currently in tank. We feel that while inventories are firm, the good news is that we continue to consume wine at an increasing rate, in spite of the surge of craft beers and spirits.

So, while you are waiting for the final game between Germany and Argentina to begin, please take a look at some very good stats by country and a great Buyer's Corner that focuses on the expanding Asian market.

Finally, while watching the game, remember the legendary English footballer's Gary Lineker's famous quote:

"Soccer is a game for 22 people that run around, play the ball, and one referee who makes a slew of mistakes, and in the end Germany always wins."



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ARGENTINA – JULY 2014

TIME ON TARGET

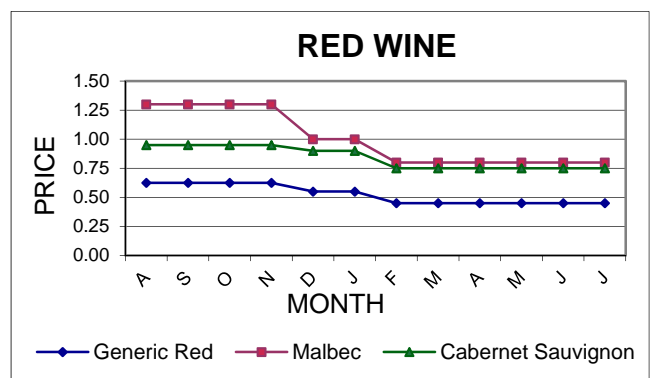
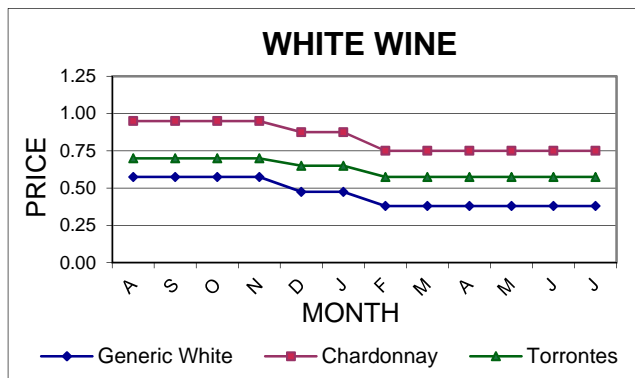
Continued uncertainty remains for local and export markets in Argentina. Both the lack of business and the economic situation have led wineries to gain a negative perspective. The grape juice concentrate market is facing an even worse scenario, as packers have paid higher prices for the raw grape material than the actual price of the sulfited must. The economy is in a hold-out situation, with indication that there could be another default. Prices have the tendency to fall, dependent upon the offer.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FCA WINERY:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.37 – 0.39	↔	2013	Generic Red	0.40 – 0.50	↔
2013	Generic White (Criolla)	0.33 – 0.35	↔	2013	Cabernet Sauvignon	0.65 – 0.85	↔
2013	Chardonnay	0.65 – 0.85	↔	2013	Malbec	0.90 – 1.00	↔
2013	Torrontes	0.55 – 0.60	↔	2013	Malbec Reserva	1.00 +	↔
2013	Chenin Blanc	0.45 – 0.50	↔	2013	Syrah / Merlot	0.65 – 0.85	↔
2013	Muscat	0.50 – 0.55	↔	2013	Bonarda / Tempranillo	0.50 – 0.60	↔

BULK PRICING OVER TIME



BITS AND PIECES

We wish we had more to add. However, all anyone can talk about is the upcoming 2014 FIFA World Cup match! Argentina will take on Germany for the third time in a World Cup Final on Sunday 13 July 2014 at 16:00 in Rio De Janeiro, Brazil.

Join us as we pull up a chair with a glass of wine and prepare for the big game!

AUSTRALIA – JULY 2014

TIME ON
TARGET

Winter has now settled in, with cool temperatures and rainy days, as many of the larger wineries finish tasting allocations for their 2014 stock. Regional material has been popular, with many searching for any available volumes of 2012 and 2013 Barossa Valley Shiraz. Commercial grade material has been less in demand, as many suppliers have surplus remaining from the 2013 vintage to cover their requirements. Enquiries remain strong for irrigated parcels of 2014 Pinot Gris, mainly required for international use (UK, US and Canada).

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	↔
2014	Chardonnay	0.60 – 0.75	↔	2014	Cabernet Sauvignon	0.90 – 1.15	↔
2014	Sauvignon Blanc	0.80 – 0.95	↔	2014	Merlot	0.80 – 0.95	↔
2014	Pinot Gris	0.95 – 1.20	↔	2014	Shiraz	0.85 – 1.10	↔
2014	Muscat	0.70 – 0.85	↔				

BITS AND PIECES – AUSTRALIA

Treasury Wine Estates has reported it will write off AU\$260 million in profit from its 2014 figures revealing that the write downs reflect the historical prices paid prior to the split from Foster's. The transaction in 2011 also takes into account equipment and commercial brands that have since reduced in value. The wine giant will also be releasing its luxury wine range from Penfolds earlier in order to better manage their allocations of their premium segment. The earlier selling date set for October allows for a longer timeframe in which the wine is available to the public, thus hopes are for an increased sales during this period.

A new merger between two of Australia's main wine bodies has now been put in place, in an effort to offer better services for the wine industry. *Wine Australia* and the *Grape & Wine Research Development Corporation* have come together to create the newly formed *Australian Grape and Wine Authority*. The merger allows the two bodies to focus on aligning wine industry decision-making and offering more effective research/development, export regulation and marketing information to the wine community.

The wine industry farewells another great Barossa Valley icon, Doug Lehmann, the eldest son of Peter Lehmann who passed away at age 63. His passing occurred suddenly from a heart attack. It is almost exactly 12 months since the passing of his father.

NEW ZEALAND – JULY 2014

Due to a large amount of information for both Australia and New Zealand, along with a lot of demand for information and samples of New Zealand Sauvignon Blanc, we have added a New Zealand page for this month.

CURRENT MARKET PRICING

PRICING IN NZD PER LITER:

Vintage	Variety	Price	Trend
2014	NZ Marlborough SB	NZ 3.80 – 4.25	↔

Demand for samples of Marlborough Sauvignon Blanc has increased dramatically over the last few weeks, with buyers interested in seeing a wide range of samples at different price points.

New Zealand Winegrowers have released vintage indicators for the 2014 harvest, please see below:

Total Crush up 29% to 445,000 tonnes:

- Marlborough region accounted for 329,500 tonnes
- Hawke's Bay crushed 44,500 tonnes
- Gisborne 16,000 tonnes
- Central Otago and Nelson crushed 10,500 tonnes each
- Waipara crushed 10,000 tonnes

Key Varietal tonnages:

- Sauvignon Blanc represented 72% and 310,00 tonnes harvested across all regions
- Pinot Noir was next at 8.5% and 36,500 tonnes harvested across all regions
- Chardonnay came in at 6.7% and 29,000 tonnes harvested
- Pinot Gris accounted for 5.6% and 24,000 tonnes harvested

Varietal Change compared to 2013 harvest:

- Sauvignon Blanc increased by 36%
- Pinot Noir by 15%
- Pinot Gris 8%

Regional Change compared to 2013 harvest:

- Marlborough increased by 31%
- Central Otago increased by 25%
- Nelson increased by 35%
- Waipara increased 32%
- Hawke's Bay increased by 15%

CALIFORNIA – JULY 2014

TIME ON
TARGET

California has many tanks full of wine from the last two vintages. The overall volume is not tremendous or surprising given the 2012 and 2013 vintages. The concern comes, as we have not seen large volume buyers, with appetites to sweep up these aging inventories. Bulk wine reacts as a commodity and will reflect pricing based on supply and demand. We need more demand...pricing might not be the issue today.

Grape Market Update:

Sales continue on demand varieties, from specific regions mainly in the North Coast. We still believe that California growers and wineries today have the highest percentage of contracted grape tonnages in the state's history. This shows the strength, financial commitment and optimism of our industry. Short term, what is considered excess, will be hard to place this buying season. Lack of available capacity will exasperate any of these overages.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.59 – 0.80	↓	2013	Generic Red	0.80 – 1.05	↓
2012 / 2013	Chardonnay	0.92 – 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	0.92 – 1.32	↓	2013	Pinot Noir	1.72 – 2.25	↔
2013	White Zinfandel	0.80 – 0.99	↓	2013	Syrah	1.19 – 1.45	↔
2013	Colombard	0.80 – 0.99	↔	2012 / 2013	Zinfandel	1.05 – 1.75	↓

BITS AND PIECES

As brokers, we are always listening and learning from our internal sources and from our customer base, both around this state and the globe. We talk daily with growers and wineries. Many issues and concerns get voiced through these conversations. To date, we have less negative chatter to report regarding this growing season. No talk of crop failure due to drought, no mildew or vine disease pressure due to bad weather, no severe shatter during bloom, just good grape growing weather overall. Do we think the year will bring record tonnages? No, but it is a nice solid crop and quality should be exceptional.

CHILE – JULY 2014

TIME ON TARGET

Red wines are now finishing malolactic fermentation and many experts agree that 2014 wines are very good in terms of quality, with nice color, full body, round tannins and no greenness. In part, this can be attributed to the fact that this was a smaller crop due to last year's spring frost.

Domestic and export sales are stable to slow, with lower demand particularly from China. White wines are still difficult to find, but are seeing lower demand in the last month. Red wines are easier to find, with the exception of Pinot Noir. In general, demand continues for Sauvignon Blanc, Chardonnay and Pinot Noir. The 2014 crop report should appear during July, latest early August.

CURRENT MARKET PRICING

ALL PRICING IN USD PER LITER; FOB PORT:

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013/2014	Generic White	0.66 – 0.70	↔	2013/2014	Generic Red	0.52 – 0.58	↔
2013/2014	Chardonnay	1.05 – 1.45	↔	2013/2014	Cabernet Sauvignon (Basic)	0.61 – 0.64	↔
2013/2014	Sauvignon Blanc	0.95 – 1.35	↑	2013/2014	Cabernet Sauvignon (Standard)	0.68 – 0.90	↔
2013/2014	Pinot Noir	0.90 – 1.50	↑	2013/2014	Cabernet Sauvignon (High Quality)	1.50 – 4.00	↔
2013/2014	Syrah	0.65 – 0.80	↔	2013/2014	Merlot	0.69 – 0.90	↔
2013/2014	Carmenere	0.62 – 0.75	↔	2013/2014	Malbec	0.73 – 2.00	↔

EXPORT FIGURES

Wine export Figures (Bulk, Bottled & Sparkling)	January – May 2013			January – May 2014			Volume
	Million Liters	Million US\$ FOB	Average Price	Million Liters	Million US\$ FOB	Average Price	Variance%
Bottled	167.66	546.92	3.26	174.42	586.66	3.36	4.03
Bulk	194.55	174.26	0.90	150.40	121.99	0.81	- 22.70
Sparkling Wines	1.03	4.28	4.14	1.22	5.27	4.31	18.23
Packed Wines	11.29	23,48	2.08	9.89	20.01	2.02	- 12.47
Total	374.54	748.93	2.59	335.92	733.93	2.63	- 10.31

- Export figures are fairly stable and similar to last month.
- Bottled wines are up 4%, compared to same period of last year (January – May).
- Bulk export are down 22.7% at 150 million liters, compared to 195 million liters for the same period last year.
- Total exports are down 10.31% compared to last year, with 335 million liters exported.

FRANCE – JULY 2014

TIME ON
TARGET

The bulk wine market remains active overall, with good inventory movement and releases of mid-sized batches by negociants, which is to be expected at this point in the buying campaign. There are some new opportunities for red wines, mainly Merlot, Cabernet Sauvignon, Pinot Noir and Rhone blends, which are showing up as wineries put new batches on the bulk market. Price trends have stabilized for all varietal wines and could slightly soften over the summer. Most known AOP wines are becoming hard to find on the bulk market (Bordeaux, Cotes du Rhone, Provence, Loire Valley AOP's), with tied inventory coverage until new vintage wines become available.

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 – 0.90	↔	2013	Generic Red (VDF)	0.72 – 0.77	↔
2013	Chardonnay (VDF)	0.97 – 1.10	↔	2013	Cabernet Sauvignon (VDF)	0.77 – 0.85	↔
2013	Chardonnay (IGP OC)	0.97 – 1.10	↔	2013	Cabernet-Sauvignon (IGP OC)	0.77 – 0.85	↔
2013	Sauvignon-Blanc (VDF)	0.95 – 1.00	↔	2013	Merlot (VDF)	0.77 – 0.85	↔
2013	Sauvignon-Blanc (IGP OC)	0.95 – 1.00	↔	2013	Merlot (IGP OC)	0.77 – 0.85	↔
2013	Generic Rosé (VDF)	0.80 – 0.90	↔	2013	Syrah (IGP OC)	0.77 – 0.80	↔
2013	Varietal Rosé (IGP OC)	0.90 – 1.10	↔	2013	Dry Muscat (IGP OC)	0.95 – 1.10	↔

BITS AND PIECES

Weather conditions in France during the last weeks of June have impacted the crop potential in differing degrees, but with moderate to serious impact, depending on the producing region. While the end of Spring was quite dry in Languedoc, rainfall in late June and early July came as a relief for most growers. The hailstorms, however, affected some important areas in main growing regions, including Corbieres, Minervois, St Chinian and La Clape. The final impact on the future crop size remains to be seen, but first estimates are announcing a potential loss of 1 to 1.2 million hectoliters. This softens the once optimistic forecast as potential concerns now include loss of fruit, mildew and dead wood material. Other regions, such as the Southwest, Rhone Valley, Provence and Loire have seen good growing conditions and only moderate impacts. The Cognac region, some Bordeaux West Bank Chateaux and some Burgundy Crus have been hardly impacted by the hailstorms episodes at all.

French customs have finally released figures for the 2013 vintage at 41.49 million hectoliters. This is even lower than the very small 2012 vintage of 41.69 million hectoliters.

GERMANY – JULY 2014



The first two weeks of July have brought some much needed rainfall, helping to balance the hydrologic inventory after a very dry month of June. Vegetation is nearly three weeks ahead of 2013 and 10 days ahead of the 25-year average. Under these circumstances, the beginning of maturation will be the end of August to the beginning of September, depending on the grape variety. This would lead to an early 2014 harvest in Germany. Almost no inventory remains available, but there is also not much demand at the moment. The bulk market has slowed down while everyone prepares for the upcoming harvest. Therefore, prices remain stable.

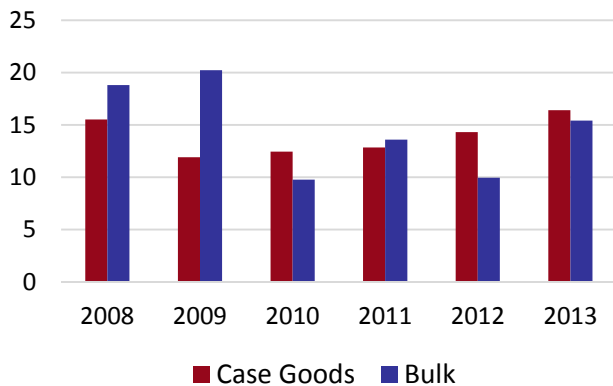
CURRENT MARKET PRICING

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

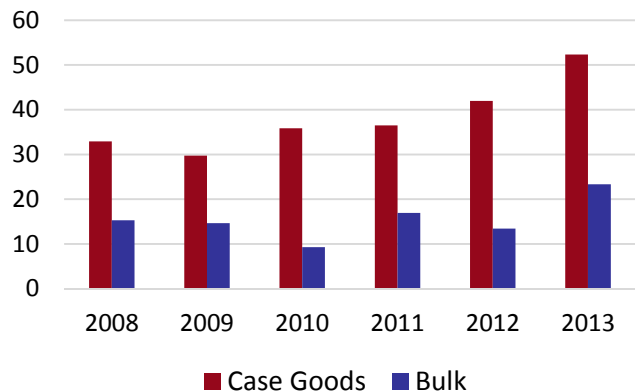
Vintage	Variety	Price	Trend
2013	White Wine	1.15 – 1.25	↑
2013	Pinot Grigio	1.50 – 1.80	↑
2013	Riesling	1.30 – 1.80	↑
2013	Red Wine	0.65 – 0.80	↔
2013	Dornfelder	0.85 – 0.95	↔

BITS AND PIECES

US Wine Exports to Germany by Volume
(in millions of liters)



US Wine Exports to Germany by Value
(in millions of dollars)



ITALY – JULY 2014

TIME ON
TARGET

Weather conditions have changed dramatically in Italy since the month of June. While previous reports in recent months predicted good temperatures and even some drought, Italy instead experienced some hailstorms and heavy rains, leading to downy or powdery mildew. The 2014 Italian crop is expected to be lower, now that Sicily and Puglia have been damaged by downy mildew. Northern Italy has also seen a lot of rain.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.28 – 0.32	↓	2013	Generic Red	0.28 – 0.32	↓
2013	Chardonnay	0.60 – 0.80	↓	2013	Cabernet Sauvignon	0.50 – 0.70	↓
2013	Pinot Grigio	0.95 – 1.15	↓	2013	Merlot	0.50 – 0.70	↓

BITS AND PIECES

Market prices for the 2014 vintage should start at a lower base than 2013 prices for most wine categories. Most 2013 varietals are already sold out. Remaining are both red and white wines of low quality and/or low color and concentration, which continue to see price decreases. Prosecco, on the other hand, has registered a 20% growth in sales. While most 2013 volumes have been sold, quotes for the 2014 vintage should be around €1.10/L to €1.20/L.

Pinot Grigio has seen a decrease in sales, mainly in the UK, which is one of the top export markets. Even if production should be lower this year than the previous, new plantings should balance this decrease in production. Primitivo varietals have been damaged by hailstorms in most original growing regions. Prices are expected to start around €0.90/L to €1.10/L, with a quick-to-start market and early commitments from buyers.

International varietals such as Merlot and Cabernet Sauvignon should be around €0.45/L from Northern Italy, with higher alcohol and concentration; Chardonnay will start at €0.45/L in Puglia, ranging up to €0.70/L.

SOUTH AFRICA – JULY 2014

**TIME ON
TARGET**

Both domestic and export wine sales have shown stable growth from previous months, but are still lower than this time last year. Most 2013 stocks no longer occupy wineries, as new 2014 harvest red and white bulk wines have been brought in. Pricing is very stable, with no significant changes in the last three months.

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	↔	2013/2014	Generic Red	5.90 – 6.30	↔
2014	Chenin Blanc	4.75 – 5.20	↔	2013/2014	Cabernet Sauvignon	6.80 – 8.00	↔
2014	Sauvignon Blanc	6.00 – 7.80	↔	2013/2014	Ruby Cabernet	6.00 – 6.30	↔
2014	Chardonnay	5.95 – 7.25	↔	2013/2014	Merlot	6.80 – 8.00	↔
2014	Muscat	5.00 – 5.30	↔	2013/2014	Pinotage	6.80 – 7.50	↔
2014	Generic Rosé	4.85 – 6.00	↔	2013/2014	Shiraz	6.80 – 8.25	↔
2014	Cultivar Rosé	5.90 – 6.60	↔	2013/2014	Cinsaut	5.90 – 6.30	↔

BITS AND PIECES

- There are 123,624 hectares of vines currently planted. Of this, about 99,680 hectares are wine-producing vines.
- There are about 7,799 hectares of Sultana and 15,755 hectares of table grape plantings, of which some will end in wine products.
- From the 99,680 hectares of wine-producing vines, there were 1,156.9 million liters of wine produced or 1,498,702 tons of grapes crushed. This means that the average yield per hectare equates to about 15 tons or 11,606 liters or 116 hectoliters.
- Of the total 1,498,702 tons, 68% is white varietals at 1,019,370 tons and 32% is red varietals at 479,391 tons.
- Total production was 1,156.9 million liters: natural wine (79.1% or 915.5 million liters), Brandy (3.6%), distilling wine (12.2%) and grape juice and grape juice concentrate (5.1%).
- The difference in carry-over stock at the end of December 2013 was 31.1 million liters less than that of the previous year. This is not a big difference, considering a carry-over volume of about 430 million liters at that time.
- Carry-over stock on December 2012 was 433 million liters, plus the 2013 wine production of 915.5 million liters amounts to 1,348.5 million liters of wine.
- There were 946.6 million liters of South African wine sold/moved in 2013 (1,348.5 million liters - 401.9 million liters carry-over stock in December 2013)
- Wine Sales in the 2013 calendar year:
 - Domestic sales: 369.5 million liters (39%)
 - Export sales: 525.6 million liters (56%)
 - Other wine-related products: 51.5 million liters (5%)

Source: Sawis.co.za

SPAIN – JULY 2014

TIME ON
TARGET

Weather conditions in recent weeks have been very favorable in most wine-producing regions, such as La Mancha and Extremadura, with good temperatures and enough water for incident-free vineyard development. However, the current global inventory level and market pace is causing major concern for wineries, as important storage issues will soon arise. Growers and negociants are assessing the 2014 crop potential with uncertainty, as the market for 2013 vintage wines remains a challenge. A new wave of sales have been made to historic international buyers, but at low prices and still behind a normal market pace.

CURRENT MARKET PRICING

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

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2013	Generic White	0.25 – 0.30	↓	2013	Generic Red	0.25 – 0.30	↓
2013	Generic Rosé	0.30 – 0.36	↓	2013	Cabernet Sauvignon	0.42 – 0.47	↓
2013	Moscatel	0.45 – 0.50	↓	2013	Merlot	0.42 – 0.47	↓
2013	Syrah	0.40 – 0.50	↓	2013	Tempranillo	0.30 – 0.40	↓

BITS AND PIECES

In an attempt to regulate the market, the Spanish Ministry of Agriculture is currently planning to set up an inventory blockage of 3.5 to 4 million hectoliters of Spanish white table wine. This will target the wine-producing regions of Spain, which have exceeded the recent yearly average production by more than 50%, first on the list being La Mancha then Extremadura, etc. The designated growers/wineries could see their inventory withdrawn from the market and kept in their cellars for a fixed period of six months, without any compensation or resale possibility.

The future decree has caused contrasted reactions and a bit of skepticism in the wine industry, as it doesn't solve the carry-over stock storage issue. With the next crop on its way, this could increase the risk of the boomerang effect once the old wine is to be put back on the market, along with new vintage. The decree implementation could prove to be challenging.

BUYER'S CORNER: ASIA 2014

CHINA

The effect of the austerity measures from the Chinese government continues to display a slowdown on the export of wines to China. Many purchasers have decreased their volumes by up to 50%, with a noticeable increase in exports of lower-priced wines versus premium wines. This slowdown is further exacerbated by the amendment of China's chemical and additive limits, with Manganese being the main issue with wine limited to 2.0mg/L. Iron and Copper have also been highlighted with new restrictions on their limits as well. It is estimated up to 23% of wines already tested at one of Australia's laboratories have been over the threshold. Many viewed the Chinese market to be the savior of oversupply, but with the government regime not easing since implemented 18 months ago, exporters may need more time to ride this one out. China is now the biggest consumer of red wine in the world, overtaking France and Italy, with consumption of 155 million cases per year. The Chinese are slowly increasing their consumption per capita with approximately 1.5 liters per person consumed (France currently at 51.9 liters.) China is the 6th largest producer of wine in the world.

JAPAN

The Australian-Japanese Free Trade Agreement is expected to be signed in the first half of 2015, with all tariffs on bulk wine to be removed immediately. Bottled goods will decrease over a seven-year period. The tariff currently stands at 15% for both bulk and bottled. Australia is currently the 6th largest exporter of wine to Japan, moving 9.4 million liters per year, valued at \$41 million. Chile, USA and Argentina are the top exporting countries for bulk shipments, with the latter being mainly for grape juice concentrate. Bottled goods show the French dominating, with Italy and Chile close behind. Hopes are for Australia to follow in the footsteps of Chile, who signed a FTA in 2007 and obtained a competitive edge over other exporters. Wine exporters have strong competition against beer, Happoshu (a low malt/low tax beer) and spirits, which make up a large proportion of alcohol consumed in Japan. There are only five main wine producers based in Japan, who make up over 80% of production for the country; with many compact wineries producing smaller volumes of the popular variety Koshu. Japan has set similar restrictions in chemical additives, with no tolerance for Copper Sulphate or Dimethyl Dicarbonate (yeast inhibitor.)

THAILAND

Thailand has a heavy taxation system for imported wines that do not have any free trade agreements in place. For example, a \$100 bottle of wine will be taxed at several layers, including an import tariff rate of 54%, excise tax at 60%, municipal tax at 10%, health tax at 2% and VAT at 7%. The \$100 bottle of wine is now at a cost of \$490.46, a duty and tax increase of 390%. Countries that do have agreements in place are enjoying the benefits of shipping bulk and bottled goods, with beer and whisky being the main competitors to wine. Price is a sensitive issue for many consumers, as those who can afford what is considered luxury goods are ex-patriates or medium to high income earners.



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