



# *Global Market Report*

**November 2020**

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**Ciatti Global Wine  
& Grape Brokers**

201 Alameda Del Prado #101  
Novato, CA 94949  
Phone (415) 458-5150



## November 2020

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The Northern Hemisphere harvests are now complete and, while official numbers remain some way off, it appears Europe's harvests were average-sized while California has had its lightest crop since 2011. OIV is forecasting 2020's total global crop at between 254 and 262 million hectolitres: coming in at the lower end of that range would make 2020 the joint second-lowest yielding year since the turn of the millennium (above 2017's 248 mhl and in line with 2002's 252 mhl).

As per usual for this time of year, however, the Northern Hemisphere's bulk markets and buyers are quiet while crop results are assessed, wine made, and OND sales analysed. The unprecedented event that 2020 will always be synonymous with – the COVID-19 pandemic – has injected understandable caution into the marketplace: much activity is proceeding in small increments. This caution will be exacerbated by the so-called 'second wave' of the virus in Europe, which has led to the reimposition of national and regional lockdowns.

The Southern Hemisphere markets have been active: Argentina's aggressively-priced offer has attracted international interest and prices there are now firming up, Chile's domestic buyers have been cornering 2021 grapes and wines off the back of a strong bulk/bottled export performance (offsetting China's quietness this year) so that prices are firming there too, while Australia's wine exports in the 12 months ending 30 September actually reached their highest value (AUD2.9 billion) for 13 years. Meanwhile, South Africa – with its less active market, currently – has been identified by astute observers as the likeliest competitor to Spain in the months ahead, able to offer very competitive, negotiable pricing on big volumes of high-quality varietal wines, generics and rosés.

All in all, globally speaking, 2020 could be considered a robust year for bulk wine sales – in terms of volume – when one considers the global pandemic and the big decline in Chinese demand. And at least one of those drags on sales seems to be easing: China intends to accelerate the re-opening of its economy after largely bringing COVID-19 under control, and will be the only major economy to grow in 2020. Wine sales value, on the other hand, will continue to be squeezed while the on-trade – specifically the HoReCa sector – gets messed around by governments anxious to be seen doing something. (In September the UK's Public Health England found that 3% of COVID-19 infections were caused by bars and restaurants versus, for example, 42% caused by education settings.)

While off-trade wine sales have been strong in many markets since COVID-19 went global in March, to the special benefit of the big brands with national/international distribution at supermarkets, it remains to be seen if this will be sustained, especially as the economic consequences of COVID-19 measures could start to be felt more keenly by consumers in 2021. Hopefully if wine sales in supermarkets fall back again it will be for a positive reason – the rolling out of an effective vaccine, permitting consumer habits to gradually return to normal. Don't hesitate to get in touch with any enquiries, and stay safe.

*Robert Selby*

# California

## *Time on target*



**HARVEST WATCH:** *Estimated at approx. 3.345 million tons*

California's 2020 harvest is now complete and estimated to have come in between 3.16 to 3.53 million tons, which would make it the smallest since 2011's 3.34 million tons, predominantly due to lighter than average yields this year. Following the spike in bulk market activity through the summer triggered by the wine sales boom in the off-premise and then smoke exposure concerns, the past 3-4 weeks have been quieter as everyone assesses the crop, makes wine and watches OND sales.



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California's bulk market has shifted from an oversupply to a more 'normal' position, with inventory greatly reduced from where it was in May. Prices are up to varying extents and the California-Coastal price separation manifesting itself again after a two-year absence. However, California appellation prices are closer to their 2017 highs than Coastal prices are to theirs – there's a feeling that, with off-premise channels driving sales, there is a ceiling on how high bulk prices can go. Some prices have already plateaued. While overall wine sales volumes in the US are projected to be flat to slightly up in calendar year 2020, value will likely be down (according to research firm bw166, it was down 7% in the 12 months to the end of September) due to the disruption to the on-premise.

We have seen activity on 2020 Sauvignon Blanc and other white varieties in the Central Valley and in the North Coast. There is less smoke exposure concern in the Valley than on the Coast and – with most of the Valley's whites having been picked before the wildfires started anyway – there have been no reports of smoke-related problems getting in the way of deals. In addition, we are seeing some early discussions on the Valley's 2021 grape supply (as well as on 2021 Pinot Noir and Chardonnay grape supply in the Coast). This is in part a symptom of the more normal market position, but also because the majority of deals done on 2020 grapes were for one year instead of three years, so buyers must now come back to the same growers to discuss 2021 and beyond.

Grape growers are encouraged not to expect that their fortunes have now turned a corner on a couple of tough years for them in terms of demand and price – the frenzy on the bulk market that we saw was in response to unprecedented events (COVID-19 and record-breaking wildfires) rather than a genuine growth in US consumer demand for wine. The off-premise accounts for only a quarter of total US wines sales by value, and – anyway – it is unknown if the uptick in off-premise wine sales will be sustained in the mid- to long-term, as we move into 2021.

**To find out more about California's bulk wine market you can read Ciatti's monthly *California Report*.**

*See next page for more on California.*

Could the lighter crop at home – plus concerns regarding vintage quality following the wildfires – persuade some Californian wine brands to look abroad for supply instead? It could happen, but at the moment California's bulk market has only just come from a long position and, to reiterate, COVID-related caution is likely to pervade brand strategizing and buying activity moving forward. While specific imported wine that provides a more attractive price-quality ratio than California can offer is key for some brands, particularly boxed brands, it is difficult switching pre-existing lines to these while maintaining positioning on the retail shelf. Meanwhile, export pricing out of the southern Central Valley remains stable.

## Key Takeaways

California's bulk market has calmed again after a frenzied end to summer triggered by strong off-premise sales and smoke exposure concerns. Prices rose dramatically on many varietals but some have subsequently levelled off. The more balanced bulk market – brought about by a significantly reduced inventory – has led to some early discussions in the Central Valley regarding 2021 grape supply. Smoke exposure seem to be far less of a concern in the Valley than on the Coast, particularly on the whites which were largely picked before the wildfires started. Southern Valley export pricing remains stable.

## Ciatti Contacts

### Import/Export

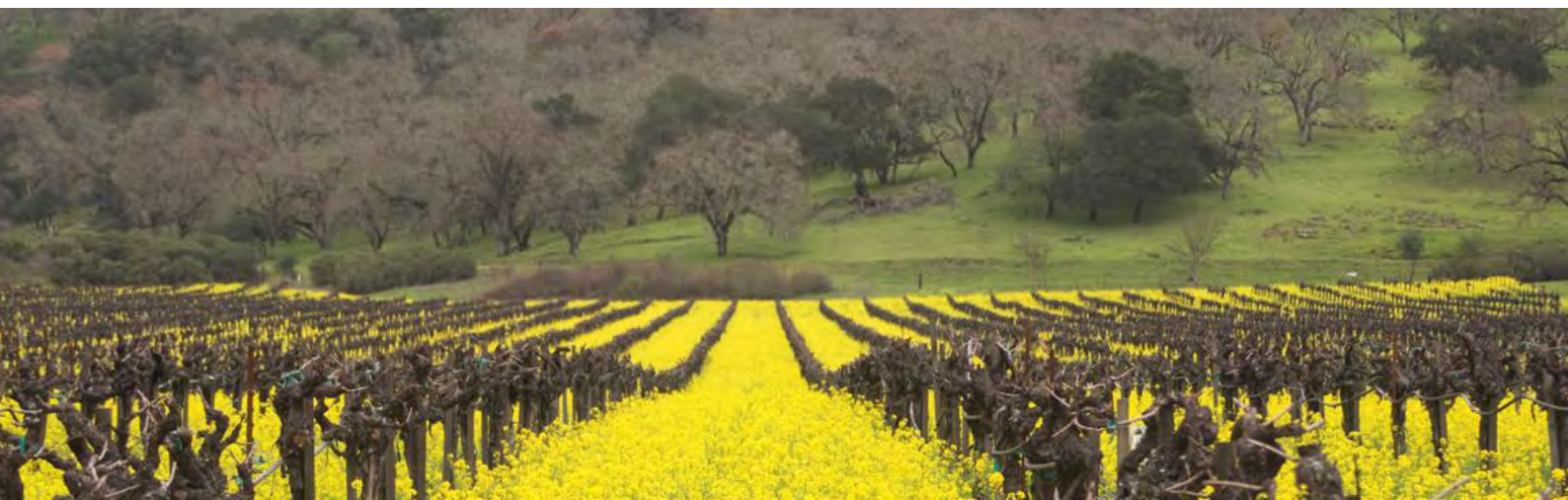
CEO – Greg Livengood  
Steve Dorfman  
Jed Lucey  
T. +415 458-5150  
E. greg@ciatti.com  
E. steve@ciatti.com  
E. jed@ciatti.com

### Domestic

T. +415 458-5150  
Glenn Proctor – glenn@ciatti.com  
John White – johnw@ciatti.com  
Chris Welch – chris@ciatti.com  
Todd Azevedo – todd@ciatti.com  
Johnny Leonardo – johnny@ciatti.com

### California: Current Export Market Pricing (USD per liter)

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2019	Generic White	0.90 – 0.99	↔	2018/19	Generic Red	0.79 – 1.05	↔
2019	Chardonnay	1.25 – 1.59	↔	2018/19	Cabernet Sauvignon	1.09 – 1.85	↔
2019	Pinot Grigio	1.25 – 1.59	↔	2018/19	Merlot	1.12 – 1.38	↔
2019	Muscat	1.10 – 1.45	↔	2018/19	Pinot Noir	1.40 – 1.85	↔
2019	White Zinfandel	0.94 – 1.00	↔	2018/19	Syrah	1.09 – 1.58	↔
2019	Colombard	0.95 – 1.00	↔	2018/19	Ruby Cabernet	0.97 – 1.10	↔
				2018/19	Zinfandel	1.20 – 1.65	↔



# Argentina

## *Time on target*



**HARVEST WATCH:** *Frost incident still being assessed; nothing subsequent*

**Argentina's bulk wine market continues to be active with good sales momentum both domestically and for export. Demand pressure on the white wines had led to declining inventory and the firming up of prices; on generic red and standard-quality Malbec prices have also firmed up due to demand levels. The domestic market has experienced a 30% rise in prices since August due to good sales. All that being said, Argentina's prices remain highly competitive and negotiable.**

An additional upward pressure on Argentina's prices is the frost episode that struck Mendoza (and neighbouring Chile) during the first weekend of October. The extent of the damage is still being assessed and should be clearer by December. The incident led to some market speculation, especially as it feeds into recent OIV statistics showing that global wine output in 2020 could – at the lowest end of its 254-262 million hectolitre estimate – be the second-smallest since the year 2000, and coming off the back of a 2019 crop that was itself one of the lowest in that twenty-year period.

There have been no subsequent frost episodes reported in Mendoza and – now we have arrived in mid-November – the frost season is over. Temperatures have been warm, with daily highs of 21-31°C and lows of 13-17°C. A hailstorm occurred on 10 November, suggesting that summer rains and storms are now arriving.

Buenos Aires has loosened its COVID-19 restrictions after seven long months, with restaurants and bars permitted to re-open at 25% of capacity. Other regions

had already been operating under eased restrictions: in Mendoza, only schools and the tourism industry have not returned to some sort of normality.

Argentina's economic instability continues. While the official peso-dollar exchange rate – ARS83/dollar – is only slightly weaker than the prior month, the unofficial 'blue dollar' has reached as weak as ARS190+/dollar at times in October and November (though it currently stands at ARS149-150/dollar as of 11 November). The blue dollar's weakness has led to an increase in domestic prices and the withholding of products as suppliers speculate on further weakening. The government still needs to renegotiate debt repayments with the International Monetary Fund and the wait for an economic action plan continues.

## *Key Takeaways*

**Though prices have firmed up on its whites as well as its generic reds and standard Malbec, Argentina continues to offer a highly attractive price-quality ratio across all wines. Robust interest from around the world continues. The official peso is softening against the US dollar (to ARS83/dollar versus ARS76-80 last month) but, due to currency controls, only gradually. The unofficial 'blue dollar' is a lot weaker. The damage caused by early October's frost episode in Mendoza is still being assessed; the frost season is now over with no more incidents reported**

## *Ciatti Contact*

Eduardo Conill  
T. +54 261 420 3434  
E. [eduardo@ciatti.com.ar](mailto:eduardo@ciatti.com.ar)

*See next page for pricing.*

## Argentina: Current Market Pricing (USD per liter; FCA Winery)

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2020	Generic White (Basic)	0.30 – 0.35	↑	2019/20	Generic Red	0.30 – 0.35	↑
2020	Generic White (Standard)	0.33 – 0.38	↑	2019/20	Cabernet Sauvignon	0.50 – 0.60	↔
2020	Muscat	0.33 – 0.38	↑	2019/20	Merlot	0.45 – 0.55	↔
2020	Torrontes	0.40 – 0.45	↑	2019/20	Syrah	0.35 – 0.45	↔
2020	Sauvignon Blanc	0.50 – 0.60	↑	2019/20	Malbec Standard	0.55 – 0.65	↑
2020	Chardonnay	0.50 – 0.60	↑	2019/20	Malbec Premium	0.70 – 1.00	↔
2019/20	Bonarda	0.35 – 0.45	↔	2019/20	Malbec High End	1.00 – 2.50	↔
				2019/20	Tempranillo	0.35 – 0.45	↔
White Grape Juice Concentrate *Per metric ton in bulk		1,100.00	↑	Red Grape Juice Concentrate (Color 1,000) *Per metric ton in bulk		1,300.00	

# Chile

## Time on target



**HARVEST WATCH:** *Vineyard conditions excellent; a large crop expected*

Domestic buyers in Chile are very active pre-contracting their 2021 grapes and wines (both whites and reds). The need for this is illustrated by Chile's bottled export performance in January to September: in line (+0.75%) with the first nine months of 2019 despite the COVID-19 headwinds and muted Chinese demand, with volume increases to Brazil (+29%), UK (+18%), Japan (+17%), the Netherlands (+20%) and Canada (+4%) offsetting the fall to China (-32%) and a smaller dip to the US (-5%).

International demand has quieted down in the past 3-4 weeks. Like their bottled counterparts, Chile's bulk exports have coped well with far less Chinese demand so far this year (-60%), coming in only 2.6% down in the first nine months of this year versus the same period of 2019. Bulk exports to the US (+40%), UK (+22%), Germany (+4%), Denmark (+5%), Canada (+25%), France (+2%) and Sweden (+50%) have all performed strongly.

As Chile's 2020 wine stocks grew greatly diminished in recent months, the prices on its 2021 grapes rose accordingly, though they have since plateaued. Chile's 2021 harvest is expected to be large due to the shorter crop in 2020, abundant water supplies and lush vineyards conditions. No further serious frost events have occurred since the one recorded over the first weekend of October. Daytime temperatures have been high – Santiago recorded its hottest ever November day (33°C) early in the month – but nights remain cold. There are some fears that continued heat, combining with the risk of some water scarcity come March or April when irrigation is being carried out, may increase the wildfire risk. A constraint on the 2021 crop size will be the high level of vine removal that are taking place as growers switch to alternative crops; vineyard area will not increase.

A big percentage of Chile's 2021 Sauvignon Blanc, Chardonnay, Pinot Noir and Pinot Grigio wines have already been contracted. The reds other than Pinot Noir remain in greater availability but – as outlined

*See next page for more on Chile.*

above – domestic buyers are now active on those too. Demand from China is also showing signs of rekindling.

The increase in 2021 grapes and wine prices in recent weeks has meant current market prices are higher than those on some pre-harvest contracts. Sauvignon Blanc, Chardonnay and Pinot Noir in particular are commanding prices steeper than anyone could have expected; prices on Cabernet and Merlot – and the other reds in general – are flatter.

The Chilean peso averaged CLP788/dollar in October but steadily strengthened against the dollar as the month wore on so that, by 10 November, it was at CLP753/dollar, its strongest level versus the dollar since early January. This is likely attributable to the

dollar's weakness during the US election and its aftermath. Chile's own big vote, its referendum, went ahead smoothly on 25 October and delivered 78% support for a new national constitution. In addition, there was 79% in favour of the new constitution being drawn up by a body which will be 100% elected by a popular vote rather than one which would have been made up by 50% of members of Congress.

Just as during Europe's late spring and early summer, COVID-19 restrictions in Chile have been eased in many areas and its HoReCa sector is seeing good business. Protests have broken out in some areas where stricter restrictions are in place – all are aware how important the HoReCa sector is to the economy.

## Key Takeaways

A big percentage of Chile's 2021 Sauvignon Blanc, Chardonnay, Pinot Noir and Pinot Grigio wines have already been contracted by domestic and international buyers. Strong demand has led to a firm increase in the wine and grape prices on those varietals, though grape prices have since plateaued. The reds other than Pinot Noir remain in greater availability and their prices are flatter. Following a largely uneventful frost season, and with good water reserves and lush vineyard conditions, Chile's 2021 crop is expected to be a large one.

## Ciatti Contact

Marco Adam  
T. +56 2 32511 691 – or –  
T. +56 2 32511 692  
E. madam@ciattichile.cl

### Chile: Current Market Pricing (Pricing in bulk; FOB Chilean Port)

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
NV	Generic White	0.50 – 0.60	↔	NV	Generic Red	0.48 – 0.60	↔
2019/20	Chardonnay	0.85 – 0.95	↑	2019/20	Cabernet Sauvignon (Basic)	0.65 – 0.80	↓
2019/20	Sauvignon Blanc	0.75 – 0.85	↑	2019/20	Cabernet Sauvignon (Varietal Plus)	0.85 – 0.95	↔
2019/20	Syrah	0.72 – 0.78	↔	2019/20	Merlot	0.75 – 0.85	↑
2019/20	Carmenere	0.75 – 0.85	↔	2019/20	Malbec (Basic)	0.90 – 1.15	↔
2019/20	Pinot Noir	0.95 – 1.15	↔				

### Chilean Export Figures

Wine Export Figures	January 2019 - September 2019			January 2020 - September 2020			Volume
	Million Liters	Million US\$ FOB	Average Price	Million Liters	Million US\$ FOB	Average Price	Variance %
Bottled	358,33	1.150,41	3,21	361,01	1.104,21	3,06	0,75
Bulk	269,91	257,72	0,95	262,85	217,73	0,83	-2,62
Sparkling Wines	3,36	13,51	4,02	2,37	10,15	4,29	-29,65
Packed Wines	15,40	27,66	1,80	20,74	36,73	1,77	34,67
<b>Total</b>	<b>646,99</b>	<b>1.449,30</b>	<b>2,50</b>	<b>646,96</b>	<b>1.368,83</b>	<b>2,49</b>	<b>0,00</b>



# France

## *Time on target*

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**HARVEST WATCH:** *Estimated at 44.9 mhl; average-plus in Languedoc*

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**The new bulk wine campaign has kicked off in France with the first round of selections being made. Although early activity is quieter this year than last due to COVID-19 uncertainty, there is demand for whites and rosés from domestic and European buyers supplying lines boosted – or at least undamaged – by the pandemic, such as those stocked by the big off-trade and/or online retailers.**

France re-entered a nationwide lockdown on 30th October for at least a month, with other European countries – such as England – doing the same or reimposing targeted restrictions. Consequently, most bulk wine purchases getting made are to cover short- or medium-term needs: the most common way of proceeding for now is in small increments, covering only the case good business that has definitely been secured. The securing of supply for supermarkets and online channels is moving forward with greater confidence than the rest of the market – especially, of course, that part of the market supplying the HoReCa channel.

The 2020 whites and rosés – standard and organic – are now available for tasting and loading; the reds will gradually become available for tasting as November wears on. The market for Chardonnay – standard and organic – has been active as the varietal is in supply-demand balance (even more so after a disappointing year in terms of Chardonnay yield) and there has been some speculation on pricing, though no concerted uptick. There is also activity around the other white varieties, and just now getting underway on the rosé.

Activity on organic reds is paused, not only because the 2020 vintage is still being prepared in cellars but

also because greater availability this year – due to a new tranche of production coming on-line – raises a question mark over pricing. Prices on Languedoc reds – standard and organic, including Vin de France – are yet to be established. Aware that the market for reds has been slow and is likely to remain so, some suppliers are accepting early deals in order to generate cashflow and avoid having to hunt for potential buyers later on.

The second half of France's Emergency Distillation Plan commenced on 1st October and the sending of wine into the distilleries is continuing in the background. The most recent estimate of France's 2020 yield remains Agreste's, dated 8th September: 44.9 million hectolitres nationally (around 7-9% up on 2019 and in-line with the five-year average) and 13 million hectolitres in the Languedoc (average-plus).

## *Key Takeaways*

**The buying campaign has commenced on the Languedoc's 2021 whites and rosés. Activity levels have been muted somewhat by COVID-19 uncertainty, with those buyers supplying the big off-trade/online retailers proceeding most confidently. All other buyers are moving forward cautiously and securing wines by small increments. Chardonnay – organic and standard – is in the most supply-demand balance. The buying campaign for the reds should gradually start to get underway this month; market prices are yet to be established.**

## *Ciatti Contact*

Florian Ceschi  
T. +33 4 67 913532  
E. Florian@ciatti.fr

*See next page for pricing.*

## France: Estimated Market Pricing (EUR per liter; Ex-Winery)

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2020	Generic White	0.65 – 0.75	↔	2020	Generic Red	0.65 – 0.70	↑
2020	Chardonnay IGP	1.00 – 1.10	↔	2020	Cabernet Sauvignon IGP	0.85 – 1.10	↓
2020	Chardonnay VDF	0.95 – 1.00	↔	2020	Cabernet Sauvignon VDF	0.75 – 0.80	↓
2020	Sauvignon Blanc IGP	0.90 – 1.05	↔	2020	Merlot IGP	0.82 – 0.90	↓
2020	Sauvignon Blanc VDF	0.85 – 0.95	↔	2020	Merlot VDF	0.75 – 0.80	↓
2020	Generic Rosé IGP	0.85 – 1.00	↔	2020	Syrah / Grenache IGP	0.82 – 0.90	↓
2020	Generic Rosé VDF	0.80 – 0.90	↔	2020	Varietal Rosé IGP	0.90 – 1.10	↔

## Spain

### *Time on target*



**HARVEST WATCH:** *An average-sized crop estimated*

The Spanish bulk market is starting to receive demand from international buyers supplying lines that have been performing well at off-trade/online retailers, though the volumes being secured are generally smaller than normal amid COVID-19 uncertainty. Buyers are assessing offers, trying samples and – instead of covering themselves for the long-term – securing volumes incrementally.

In general, with domestic and European buyers highly cautious, the Spanish bulk market is slow. The country's suppliers must be alive to those parts of the market that are active while focussing on reconducting any historical deals that they can. Spanish pricing has softened through 2020 but has struggled to pull in greater buyer interest – concerning for suppliers, many of who will struggle to make a profit at current prices. These prices should now remain stable until springtime when an assessment can be made of winter rainfall levels and the early growing conditions.

Spain will be highly aggressive on pricing during this buying campaign and will at the very least remain the first port of call for European buyers. As such, from a buyer's point of view, opportunities abound: big volumes are available at highly competitive pricing – including on the Sauvignon Blancs, other varietal whites and rosés that may be attractive to Canadian or US buyers due to California's difficulties and the current shortness of such wines in Chile and Argentina.

Estimates of Spain's 2020 yield range from anything from 37.5 million hectolitres (OIV; closer to 2019's yield) to 45 million hectolitres (more in line with 2018's yield). Our expectation is that the crush came in towards the higher of those two estimates.

Spain has – at the time of writing (11th November) – resisted entering a second nationwide lockdown to combat COVID-19, preferring to proceed with regional measures. As such, restrictions on bars and restaurants vary across the country: they have been shut in Barcelona since mid-October, for example, but remain open in Madrid.

*See next page for more on Spain.*

# Key Takeaways

The buying campaign in Spain has got off to a slow start, with the most active buyers being those supplying the big off-trade and online retailers. Volumes are mainly being secured in small increments. Prices have softened this year and will likely remain stable at their current (low) level until vineyard conditions are assessed in springtime. Spain can provide large volumes at highly competitive pricing, and may become a port of call for North American buyers struggling to locate the supply they need in South America.

## Ciatti Contact

Nicolas Pacouil  
T. +33 4 67 913531  
E. nicolas@ciatti.fr

### Spain: Current Market Pricing (EUR per liter; Ex-Winery)

Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
2020	Generic White	0.30	-	0.35	↓	2020	Moscatel	0.40	-	0.50	↓
2020	White Blends (Higher Quality)	0.35	-	0.45	↓	2020	Generic Red	0.30	-	0.45	↓
2020	Sauvignon Blanc	0.50	-	0.60	↓	2020	Generic Red (Higher Quality)	0.45	-	0.55	↓
2020	Chardonnay	0.65	-	0.75	↓	2020	Cabernet Sauvignon	0.45	-	0.55	↓
2020	Generic Rosé	0.30	-	0.40	↓	2020	Merlot	0.50	-	0.60	↓
2020	Varietal Rosé	0.35	-	0.45	↓	2020	Syrah	0.40	-	0.50	↓

# Italy

## Time on target

**HARVEST WATCH:** *Estimated at 46.6 million hectolitres*

October was a very good month for Italy's wineries, with orders coming in from the US, UK and other international markets. The main concern now is the recent and doubtless ongoing reimposition of COVID-19 restrictions and lockdowns across Europe through wintertime, with a sense that things will not ease again until the spring. Italy itself has reimposed regional lockdowns – at the time of writing these apply to Lombardy, Piedmont, Aosta Valley and Calabria.

The high level of uncertainty brought about by COVID-19's second wave across Europe has removed any market visibility moving forward, making purchasing and production very difficult to plan. The majority of bottlers are buying only the wine they are sure to use; for any business with a question mark over it, they are opting to buy in monthly increments.

Producers, too, are facing uncertainty. Any deterioration in the COVID-19 situation during winter will likely increase price volatility. Final production data from Italy's 2020 harvest has yet to be released, but based on the most recent Assoenologi/ISMEA/UIV data –

*See next page for more on Italy.*

released 28th October – production is estimated at approximately 46.6 million hectolitres, down 2% from 2019's 47.5 million hectolitres. According to this data, performance varied widely between the regions, with production in Veneto (+1), Emilia Romagna (+10%), Abruzzo (+6%) and Piedmont (+3%) up on 2019, but down in Puglia (-8%), Sicily (-20%) and Tuscany (-21%). The overall quality of the 2020 vintage is good, with the highest qualities found among the late varietals. Prosecco DOC Rosé is finally on the way to the shelves of the world, bringing a 13% increase in the bottling data

for October 2020 versus the same month of 2019. The Prosecco price is stable between EUR155 and EUR165 per hectolitre, with the market in equilibrium. Pinot Grigio DOC bottlings were stable at 149,000 hectolitres in October; some big foreign groups are interested in increasing their volumes from Italy because of short supply from other countries.

Market prices are stable against October, with buyers waiting to start tasting the new vintage reds.

## Key Takeaways

Italy's wine sales have remained robust in the face of the pandemic and there were good levels of international interest in October. Uncertainty understandably pervades the market due to COVID-19's second wave in Europe, with the majority of buyers proceeding by increments and prices – stable currently – potentially becoming more volatile in the months ahead. Italy's 2020 crop looks average-sized – down only 2% on 2019's – and quality is good. Prosecco DOC Rosé is being bottled and despatched; the Prosecco price is stable; Pinot Grigio DOC bottlings have been stable.

## Ciatti Contact

Florian Ceschi  
T. +33 4 67 913532  
E. Florian@ciatti.fr

### Italy: Current Market Pricing (EUR per liter; Ex-Winery)

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2020	Generic White (Alc. 9 - 10%)	0.35 – 0.45	↑	2020	Generic Red (Alc. 11 - 12%)	0.45 – 0.60	↔
2020	Generic White (Alc. 11 - 13%)	0.40 – 0.58	↔	2020	Generic Red (Alc. 13%)	0.60 – 0.80	↑
2020	Organic Generic White (Alc. 10.5 - 12%)	0.55 – 0.70	↑	2020	Organic Generic Red (Alc. 11 - 13%)	0.80 – 1.20	↑
2020	Varietal Chardonnay (Alc. 11 - 13%)	0.70 – 1.00	↔	2020	Varietal Cabernet Sauvignon (Alc. 12 - 13%)	0.75 – 0.95	↑
2020	Organic Pinot Grigio (Alc. 12%)	1.20 – 1.50	↔	2020	Varietal Merlot (Alc. 12 - 13%)	0.70 – 0.90	↔
2020	DOC Pinot Grigio delle Venezie	0.85 – 1.00	↔	2020	Varietal Syrah (Alc. 12 - 13%)	0.70 – 0.95	↔
2020	Pinot Grigio IGT (Different Regions)	0.75 – 0.90	↑	2020	Rossissimo (Alc. 12.5 - 14%)	1.05 – 1.20	↑
2020	Pinot Grigio IGT (Blends)	0.60 – 0.80	↔	2020	Primitivo IGT Puglia/ Salento (Alc. 12 - 14%)	1.40 – 1.70	↑
2020	DOC Prosecco (Cannot be sold outside of Italy)	1.55 – 1.65	↔	2020	Sangiovese IGT (Alc. 11.50 - 13%)	0.55 – 0.70	↑
2020	Soave or Garganega DOC	0.85 – 1.00	↔	2020	Trebbiano IGT (Alc. 10.5 - 12%)	0.45 – 0.55	↔

**\*Bottled Price**



# South Africa

## *Time on target*



**HARVEST WATCH:** *Vineyards healthy; no frost concerns*

The Western Cape's bulk wine market had an average October, similar to the same month of 2019, with contracted wines shipping as per schedule and some buyers – if they needed to – topping up volumes to last through to next vintage. Buyers are mainly proceeding cautiously, taking small volumes as and when they need them.

With assessments of Europe's harvests and subsequent pricing still being made, and the reimposition of COVID-19 lockdowns in some European countries adding to a cautious outlook, European interest is limited. The annual Tariff Rate Quota (TRQ) enjoyed by South African wines entering the EU is normally maxed-out by 1 September but last year it took until mid-October and it is taking even longer this time.

Latest SAWIS data shows that South Africa's total wine exports for the January to September period reached 232.7 million litres. While extrapolated out this would mean – despite the COVID-19 headwinds – a full year 2020 export performance in line with full year 2019's 319.7 million litres, it must be remembered that 2019's performance was significantly down on the five-year average (427.5 million litres in 2018, 455.1 million in 2017, 434.5 million in 2016 and 420.7 million in 2015).

South Africa thus has work to do regaining the market share it has lost. However, it has the means to do so, with good availability on all wines and highly competitive pricing. In addition, 2020 vintage quality is excellent and wines have been well-kept – the whites remain in extremely good condition, for example. Suppliers are willing to

negotiate on price and work with buyers to nurture future business and grow sales in the longer-term. Rand pricing in general is stable and the Rand itself has been stable against the dollar (ZAR16-17) and euro (ZAR18-19) for the past three months or so.

Domestic wine sales, meanwhile, have been steady since the lifting of the alcohol sales ban on 17 August. Bars and restaurants remain open, operating under restrictions.

The Western Cape is moving into late spring and the vineyards appear very lush and green following a wet winter (dam levels are close to 100% capacity). As per normal, there has continued to be 1-2 days of rain every couple of weeks or so through October into November, keeping the water table high. The main frost risk period has ended with few if any problematic incidents and all is looking good – as it stands, at this early stage – for vintage 2021.

## *Key Takeaways*

Market activity in the Western Cape was steady in October, with international buyers proceeding cautiously while Europe's harvests and the latest COVID-19 developments around the world are assessed. The Cape has good availability on all wines and highly competitive, stable pricing that is open to negotiation, with suppliers flexible and willing to talk long-term in order to regain some global market share for South Africa. Its total wine export volumes for 2020 look like coming in similar in size to 2019 – a year when exports were significantly down on the long-term average

## *Ciatti Contacts*

Petré Morkel  
T. +27 82 33 88 123  
E. petre@ciatti.co.za

*See next page for more on pricing.*

## South Africa: Current Market Pricing (SA Rand per liter, FOB Cape Town)

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
2020	Dry White	5.40 – 6.00	↓	2020	Generic Red	8.50 – 9.50	↓
2020	Chardonnay	10.80 – 11.50	↓	2020	Cabernet Sauvignon	11.80 – 13.00	↓
2020	Sauvignon Blanc	10.50 – 13.00	↓	2020	Ruby Cabernet	9.50 – 10.00	↓
2020	Chenin Blanc	7.00 – 8.50	↓	2020	Merlot	11.50 – 12.50	↓
2020	Colombard	6.00 – 6.50	↓	2020	Pinotage	10.50 – 11.50	↓
2020	Muscat	6.00 – 6.50	↓	2020	Shiraz	11.00 – 12.00	↓
2020	Generic Rosé	5.80 – 6.50	↓	2020	Cinsaut Rose	8.25 – 9.00	↓
2020	Cultivar Rosé	8.20 – 9.00	↓				

**NB:** pricing is directly related to remaining available stock and - due to the current short situation - can change without notice

# Australia & New Zealand

## Time on target



**HARVEST WATCH:** *La Niña could bring above-average rainfall to Au; frost damage in Marlborough*

Political tensions between Australia and China have ratcheted up still further with a ban – yet to be confirmed by the Chinese authorities – on all imports of Australian wine into China commencing from 6th November 2020. This follows a lengthy anti-dumping and anti-subsidy investigation by the Chinese government which, should it deem that Australian wines have been ‘dumped’ at low prices onto the Chinese market, could apply tariffs to bottled wine (and possibly bulk wine) imports at the rate of 202%.

It is understood that China’s Alcohol Drinks Association (CADA) has requested the Chinese Ministry of Commerce apply retrospective tariffs on Australian wine imports. Australia’s exporters were disappointed to hear the news – at the last count, the annual value of Australian wine exports to mainland

China was AUD1.2 billion. All orders have been placed on hold whilst further clarification is sought. (The potential ban also extends to seven other Australian products: cotton, wool, barley, lobster, sugar, timber and copper.)

This situation is expected to affect Australia’s red grape pricing in 2021 as the resulting wines would no longer be required for the Chinese market. European markets have been active, soaking up much white and red volume throughout the year amid their respective COVID-19 lockdowns/restrictions. Pricing on Chardonnay and other white varieties like Sauvignon Blanc and Pinot Gris is expected to increase slightly with good demand to flow on into next year. Healthy winter rainfall levels mean hefty AUD600-800/megalitre price tags for spot water purchases will be averted.

Wine Australia’s latest export report shows that the overall value of the country’s wine exports increased 4% to AUD2.998 billion in the 12 months ending 30th September 2020. Volume, meanwhile, declined marginally by 0.4% to 771 million litres. The value

*See next page for more on Australia & New Zealand.*

figure is at its highest since 2007, mainly driven by recent growth to the UK and China. Exports of bulk wine increased by 13% in value to AUD576 million and 2% in volume to 427 million litres.

The La Niña weather phenomenon is expected to continue into early next year, bringing with it above-average rainfall to the majority of Australia during spring and to the eastern seaboard during summer. Experts predict the ocean-atmosphere event could reach its peak in December, potentially leading to a warm and wet summer.

**New Zealand's** wine exports have boomed since the start of the COVID-19 pandemic, according to new statistics from New Zealand Winegrowers. Export volumes for March to June were up 6% versus the equivalent period of 2019, while for the month of July they were up nearly a quarter at 23%. As there were low stock levels of the 2019 vintage remaining, an early shift to the 2020 vintage saw 8.0 million

litres of 2020 Sauvignon Blanc exported in June followed by a further 14 million litres in July.

New Zealand's large 2020 harvest – 457,000 tonnes – was well-received as sales have steadily been depleting the 2020 stock. Marlborough Sauvignon Blanc has consistently been in high demand and harder to source in bulk, with prices at circa NZD4.50/litre. The US remains the leading market, ahead of Australia and the UK. There have been reports that New Zealand wines could be included in China's – still to be confirmed – ban on Australian wine imports; however, as outlined above, all information pertaining to this matter remains unclarified.

There has been some frost damage in Marlborough and early indications are that there will be an increase in grape pricing for 2021. As outlined above, demand is still very high and very little excess stock is seen.

## Australian Wine Exports



Source: Wine Australia

# Key Takeaways

China's reported intention to impose an import ban on Australian bottled (and possibly bulk) wine is a big concern for the Australian wine industry, considering its exports to China are worth AUD1.2 billion a year. Orders to China have been placed on hold until the matter is clarified. Australia's 2021 red grape pricing is likely to be affected but European demand on all wines – due to COVID-19 lockdowns/restrictions – has been strong and pricing on 2021 white varietals is expected to increase. Australia's growing areas could receive above-average rainfall due to La Niña. Strong export demand for New Zealand wine during the pandemic (up 23% in July) led to an early shift to the large 2020 vintage and sales have quickly depleted the stocks; grape prices for 2021 are likely to increase.

## Ciatti Contacts

Matt Tydeman  
T. +61 8 8361 9600  
E. matt@ciatti.com.au

Simone George  
T. +61 8 8361 9600  
E. simone@ciatti.com.au



官方微信公众号

### Australia: Current Market Pricing (AUD/litre unless otherwise stated)

Vintage	Variety	Price	Trend	Vintage	Variety	Price	Trend
NV	Dry White	0.85 – 0.95	↔	NV	Dry Red	1.15 – 1.25	↔
2020	Chardonnay	1.10 – 1.20	↑	2020	Cabernet Sauvignon	1.30 – 1.45	↓
2020	Sauvignon Blanc	1.20 – 1.30	↑	2020	Merlot	1.30 – 1.45	↓
2020	Pinot Gris	1.20 – 1.30	↑	2020	Shiraz	1.30 – 1.45	↓
2020	NZ Marlborough SB	NZD 4.30 – 4.50	↑	2020	Muscat	0.90 – 1.00	↔

*Price stated are indicative only; all offers subject to prior sale and subject to volume, drawdown and terms*



# Structan

## A Smoke Taint Solution



As many winemakers in California are currently only too aware, after wildfires blazed across the state following August's freak lightning storms, the biggest commercial damage caused by fire can be smoke drifting into vineyards prior to – or during – harvest. Wines made from smoke-affected grapes can be characterized by unpleasant smoky, ashy or burnt aromas with an excessively drying back palate and retronasal ash character. Unsurprisingly, consumers have been shown to respond negatively to such wines.

The three main factors that determine if smoke-exposed grapes become smoke-tainted are: the growth stage of the grapevine, the variety of the grapes and the length of their smoke exposure. Grapes close to picking readiness, grapes being of the typically most susceptible varieties (Cabernet and Pinot Noir of the reds, Pinot Grigio, Chardonnay and Sauvignon Blanc of the whites), and prolonged smoke exposure, increase the taint risk. All three factors currently apply in California: the smoke has settled in vineyards mid-harvest, the most sensitive varieties are the state's leading cultivars by acreage, and smoke has been lying in some areas for many days.

The compounds in smoke known as free volatile phenols (such as Guaiacol and 4-methylguaiacol) are absorbed directly by the grapes and can bind to grape sugars as glycosides. These glycosides break apart during fermentation (or over time in the barrel or bottle), releasing the volatile phenols into the must/wine so that a smoky flavor becomes perceptible. They can also be released in the mouth during drinking, contributing to the perception of smoke taint.

**What solution can our partners at Stoak Technologies offer winemakers visited by smoke? Well, Structan – their all-natural, organic-certified, liquid oak extract – can not only be used as a finishing tannin and wine stabilizer but also as a smoke-taint masking option.** Results from chemical analysis and sensory evaluation against a control,

carried out by PhD research in the Viticulture & Oenology Department at the University of Stellenbosch, have shown that Structan reduces the perceived intensity of smoke-taint flavor and aroma in smoke-affected wines.

While other winemaking interventions – such as reverse osmosis – may reduce the concentration of smoke-derived volatile phenols in wine, it has not yet been shown that it is possible to completely remove them and, anyway, such interventions also strip the wine of its best characteristics (and any positive impact does not last). Structan, however, successfully masks the volatile phenols through increasing the wine's overall complexity, thus preserving the wine's best flavor, aroma and color attributes, for up to five years.

In fact, one of the Western Cape's premier wineries, which sells its wines into the European market, used Structan to make a highly successful red wine. That was after a wildfire similar to those seen in California, when thick smoke lingered in the vineyards for three weeks.

In summary, Structan is your smoke taint solution. And its stable liquid form makes measuring and adding really simple, with no premixing or dissolving necessary. Just dose during the fermentation process and/or in the blending tank, to get stabilized, complex wines free from unpleasant flavors and aromas. Give us a call.

## *Fearless Contacts*

**CEO  
Rob Bolch**

T. +1 800/288 5056  
E. Rob@johnfearless.com

**Purveyor of Quality Used Oak Barrels  
Thomas Gilbert**

E. Thomas@johnfearless.com

**Manager, Brewing Technical  
Support and Key Accounts  
Matt Johnson**

E. Matt@johnfearless.com

[www.johnfearless.com](http://www.johnfearless.com)

**Sales Manager, Customer  
& Operations Support  
Geoff Eiter**

T. +1 800/288 5056  
E. Geoff@johnfearless.com

**Andrew Planting  
T. +707/699-5117**

E. Andrew.planting@stoaktechnologies.com

[www.stoaktechnologies.com](http://www.stoaktechnologies.com)



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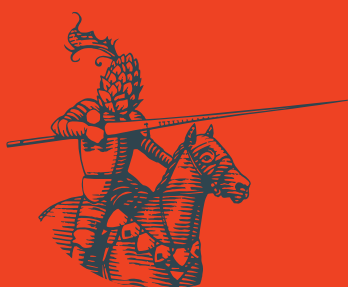
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# Export Pricing: USD per liter

Currency Conversion Rates as of November 16, 2020

Argentina (Pricing in bulk; FCA)											
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
2020	Generic White (Basic)	0.30	-	0.35	↑	2019/20	Generic Red	0.30	-	0.35	↑
2020	Generic White Standard	0.33	-	0.38	↑	2019/20	Cabernet Sauvignon	0.50	-	0.60	↔
2020	Muscat	0.33	-	0.38	↑	2019/20	Merlot	0.45	-	0.55	↔
2020	Torrontes	0.40	-	0.45	↑	2019/20	Syrah	0.35	-	0.45	↔
2020	Sauvignon Blanc	0.50	-	0.60	↑	2019/20	Malbec Standard	0.55	-	0.65	↑
2020	Chardonnay	0.50	-	0.60	↑	2019/20	Malbec Premium	0.70	-	1.05	↔
2019/20	Bonarda	0.35	-	0.45	↔	2019/20	Malbec High End	1.00	-	2.50	↔
						2019/20	Tempranillo	0.35	-	0.45	↔

Australia & New Zealand (Pricing in bulk; FCA)						AUD Rate: 0.731701 / NZD Rate: 0.689541					
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
NV	Dry White	0.62	-	0.70	↔	NV	Dry Red	0.84	-	0.91	↔
2020	Chardonnay	0.80	-	0.88	↑	2020	Cabernet Sauvignon	0.95	-	1.06	↓
2020	Sauvignon Blanc	0.88	-	0.95	↑	2020	Merlot	0.95	-	1.06	↓
2020	Pinot Gris	0.88	-	0.95	↑	2020	Shiraz	0.95	-	1.06	↓
2020	NZ Marlborough SB	2.97	-	3.10	↑	2020	Muscat	0.66	-	0.73	↔

California (Pricing in bulk; FCA)											
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
2019	Generic White	0.90	-	0.99	↔	2018/19	Generic Red	0.79	-	1.05	↔
2019	Chardonnay	1.25	-	1.59	↔	2018/19	Cabernet Sauvignon	1.09	-	1.85	↔
2019	Pinot Grigio	1.25	-	1.59	↔	2018/19	Merlot	1.12	-	1.38	↔
2019	Muscat	1.10	-	1.45	↔	2018/19	Pinot Noir	1.40	-	1.85	↔
2019	White Zinfandel	0.94	-	1.00	↔	2018/19	Syrah	1.09	-	1.58	↔
2019	Colombard	0.95	-	1.00	↔	2018/19	Ruby Cabernet	0.97	-	1.10	↔
						2018/19	Zinfandel	1.20	-	1.65	↔

Chile (Pricing in bulk; FOB Chilean Port)											
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
NV	Generic White	0.50	-	0.60	↔	NV	Generic Red	0.48	-	0.60	↔
2019/20	Chardonnay	0.85	-	0.95	↑	2019/20	Cabernet Sauvignon (Basic)	0.72	-	0.80	↓
2019/20	Sauvignon Blanc	0.75	-	0.85	↑	2019/20	Cabernet Sauvignon (Varietal Plus)	0.85	-	0.95	↔
2019/20	Syrah	0.72	-	0.78	↔	2019/20	Merlot	0.75	-	0.85	↑
2019/20	Carmenere	0.75	-	0.85	↔	2019/20	Malbec	0.90	-	1.15	↔
2019/20	Pinot Noir	0.95	-	1.15	↔						

France (Estimated Pricing in bulk; Ex-Winery)										Rate: 1.183770	
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
2020	Generic White	0.77	-	0.89	↔	2020	Generic Red	0.77	-	0.83	↑
2020	Chardonnay IGP	1.18	-	1.30	↔	2020	Cabernet Sauvignon IGP	1.01	-	1.30	↓
2020	Chardonnay VDF	1.12	-	1.18	↔	2020	Cabernet Sauvignon VDF	0.89	-	0.95	↓
2020	Sauvignon Blanc IGP	1.07	-	1.24	↔	2020	Merlot IGP	0.97	-	1.07	↓
2020	Sauvignon Blanc VDF	1.01	-	1.12	↔	2020	Merlot VDF	0.89	-	0.95	↓
2020	Generic Rosé IGP	1.01	-	1.18	↔	2020	Red Syrah / Grenache IGP	0.97	-	1.07	↓
2020	Generic Rosé VDF	0.95	-	1.07	↔	2020	Varietal Rosé IGP	1.07	-	1.30	↔

Italy (Pricing in bulk; Ex-Winery)										Rate: 1.183770	
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
2020	Generic White (Alc. 9 - 10%)	0.41	-	0.53	↑	2020	Generic Red (Alc. 11 - 12%)	0.53	-	0.71	↔
2020	Generic White (Alc. 11 - 13%)	0.47	-	0.69	↔	2020	Generic Red (Alc. 13%)	0.71	-	0.95	↑
2020	Organic Generic White (Alc. 10 - 12%)	0.65	-	0.83	↑	2020	Organic Generic Red (Alc. 11 - 13%)	0.95	-	1.42	↑
2020	Varietal Chardonnay (Alc. 11 - 13%)	0.83	-	1.18	↔	2020	Varietal Cabernet Sauvignon (Alc. 12 - 13%)	0.89	-	1.12	↑
2020	Organic Pinot Grigio (Alc. 12%)	1.42	-	1.78	↔	2020	Varietal Merlot (Alc. 12 - 13%)	0.83	-	1.07	↔
2020	DOC Pinot Grigio delle Venezie	1.01	-	1.18	↔	2020	Varietal Syrah (Alc. 12 - 13%)	0.83	-	1.12	↔
2020	Pinot Grigio IGT (Different Regions)	0.89	-	1.07	↑	2020	Rossissimo (Alc. 12.5%)	1.24	-	1.42	↑
2020	Pinot Grigio IGT (Blends)	0.71	-	0.95	↔	2020	Primitivo IGT Puglia/ Salento (Alc. 12 - 14%)	1.66	-	2.01	↑
2020	DOC Prosecco (Cannot be sold outside of Italy)	1.83	-	1.95	↔	2020	Sangiovese IGT (Alc. 11.50 - 13%)	0.65	-	0.83	↑
2020	Soave or Garganega DOC	1.01	-	1.18	↔	2020	Trebbiano IGT (Alc. 10.5 - 12%)	0.53	-	0.65	↔
<b>*Bottled Price</b>										<b>0.71</b>	

South Africa (Pricing in bulk; FOB Cape Town)										Rate: 0.065164	
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
2020	Generic White	0.35	-	0.39	↓	2020	Generic Red	0.59	-	0.62	↓
2020	Chardonnay	0.70	-	0.75	↓	2020	Cabernet Sauvignon	0.77	-	0.85	↓
2020	Sauvignon Blanc	0.68	-	0.85	↓	2020	Ruby Cabernet	0.62	-	0.65	↓
2020	Chenin Blanc	0.46	-	0.55	↓	2020	Merlot	0.75	-	0.81	↓
2020	Colombard	0.39	-	0.42	↓	2020	Pinotage	0.68	-	0.75	↓
2020	Muscat	0.39	-	0.42	↓	2020	Shiraz	0.72	-	0.78	↓
2020	Generic Rosé	0.47	-	0.51	↓	2020	Cinsaut Rosé	0.54	-	0.59	↓
2020	Cultivar Rosé	0.53	-	0.59	↓						

Spain (Pricing in bulk; Ex-Winery)										Rate: 1.183770	
Vintage	Variety	Price			Trend	Vintage	Variety	Price			Trend
2020	Generic White	0.36	-	0.41	↓	2020	Generic Red	0.36	-	0.53	↓
2020	White Blends (Higher Quality)	0.41	-	0.47	↓	2020	Generic Red (Higher Quality)	0.53	-	0.65	↓
2020	Sauvignon Blanc	0.59	-	0.71	↓	2020	Cabernet Sauvignon	0.53	-	0.65	↓
2020	Chardonnay	0.77	-	0.89	↓	2020	Merlot	0.59	-	0.71	↓
2020	Generic Rosé	0.36	-	0.47	↓	2020	Syrah	0.47	-	0.59	↓
2020	Varietal Rosé	0.41	-	0.53	↓	2020	Moscatel	0.47	-	0.59	↓

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# Contact Us :

## Argentina

Eduardo Conill  
T. +54 261 420 3434  
E. eduardo@ciatti.com.ar

## Australia / New Zealand

Matt Tydeman  
Simone George  
T. +61 8 8361 9600  
E. matt@ciatti.com.au  
E. simone@ciatti.com.au

## California – Import / Export

CEO – Greg Livengood  
Steve Dorfman  
T. +415 458-5150  
E. greg@ciatti.com  
E. steve@ciatti.com  
E. jed@ciatti.com

## California – Domestic

T. +415 458-5150  
Glenn Proctor – glenn@ciatti.com  
John White – johnw@ciatti.com  
Chris Welch – chris@ciatti.com  
Todd Azevedo – todd@ciatti.com  
Johnny Leonardo – johnny@ciatti.com

## John Fearless CO. Craft Hops & Provisions

CEO - Rob Bolch  
Sales - Geoff Eiter  
T. + 1 800 288 5056  
E. rob@johnfearless.com  
E. geoff@johnfearless.com  
www.johnfearless.com

## Concentrate

Jed Lucey  
T. +415 458-5150  
E. jed@ciatti.com

## Canada & US clients outside of California

Dennis Schrapp  
T. +905 688-1340  
E. dennis@ciatticanada.com

## Chile

Marco Adam  
T. +56 2 32511 691 or  
T. +56 2 32511 692  
E. madam@ciattichile.cl

## China / Asia Pacific

Simone George  
T. +61 8 8361 9600  
E. simone@ciatti.com.au  
T. +86 13761583085  
E. china@ciatti.com.au

## France / Italy

Florian Ceschi  
T. +33 4 67 913532  
E. Florian@ciatti.fr

## Germany

Christian Jungbluth  
T. +49 6531 9734 555  
E. christian@ciatti.biz

## Spain

Nicolas Pacouil  
T. +33 4 67 913531  
E. nicolas@ciatti.fr

## UK / Scandinavia / Holland

Catherine Mendoza  
T. +33 4 67 913533  
E. catherine@ciatti.fr

## South Africa

Vic Gentis  
T. +27 21 880 2515  
E. vic@ciatti.fr

-or-

Petré Morkel  
T. +27 82 33 88 123  
E. petre@ciatti.co.za

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