

## ANNUAL REPORT 2012

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Catalunya

A stylized, gold-colored map of Catalonia is positioned below the word 'Catalunya'. The map is composed of several thick, brush-stroke-like shapes that outline the geographical region.

DENOMINACIÓ D'ORIGEN

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### DESIGNATION OF ORIGIN "CATALUNYA" REGULATORY COUNCIL

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## 1. INTRODUCTION

As every year, the Regulatory Council prepares the annual report of the *Designation of Origin Catalunya*. This year corresponds to 2012 financial period.

The total volume of qualified wine has been 530.002 hl, 5,6% higher than 2011. Analysing it by wine colour, although rosé and red wine scarcely change from last year, white wine increases by 11%. Proportionally, red and white wine comprise the majority of qualified wine, both very similar in figures. Yet, this year white wine has reached first position (46,1% and 47,8%, respectively). Rosé adds up 11,6%, the same rate as last year.

Out of the total of qualified wines, 314.814 hl (59,4%) are 2011 harvest wines and the rest correspond to other vintages. This rate drops by 7,3% compared to the previous year.

Regarding bottled wine, 60,7 million (M) bottles (0,75L) have been commercialized in 2012, from which 24,8 (40,9%) has been distributed to the internal market and the remaining 35,9 M (59,1%), has been destined to the external market. Comparing these figures with those of 2011, we see growth in both markets: the external market has a higher growth rate (+9,8%) while the internal market increases by +6,9%). The overall increase of commercialization in respect to the previous financial period has been 4,8 million bottles (+8,6%). Commercialization shows growth one more year, exceeding 60 M.

Major export markets are within the European Union, with a total of 21,8 M bottles (60,7% of exports, 12,4% more than last period). The United Kingdom and Germany are still the most significant markets with more than 4,5 M bottles. Followed by the Netherlands with 3,2 M and Denmark, Ireland, Sweden and Belgium, in this same order, all of the exceeding one million. France and Latvia also have prominent figures. Outside EU but still within the European continent, Switzerland and Norway are still the main buyers.

Further important markets are the United States with 1,8 M bottles (+7,1%), Canada (+8,5%), Japan (+5,4%) and Mexico (+14,9%) with figures around 900.000 bottles. China's emerging market already exceeds 750.000 bottles with a growing rate of 11,4%. Overall, wines from DO CATALUNYA have reached 114 different countries from all over the world.

Thanks to the efforts of many viticulturists and wineries that work with us we are able to process these results. We appreciate the confidence they place in us year after year.



CONSELL  
REGULADOR  
DENOMINACIÓ  
D'ORIGEN  
CATALUNYA

**Xavier Pié i Dols**  
President C.R.D.O. CATALUÑA  
April 2013

## 2. SITUATION OF RECORD OF ACTIVITIES (a 31/12/12)

**RECORD OF VITICULTURISTS: 9.097 viticulturists**

**RECORD OF VINEYARDS (RVC): 48.145 ha**

**RECORD OF WINERIES:**

<b>WINEMAKING section</b>	
Number of registered wineries:	<b>164</b>
<b>STORAGE section</b>	
Number of registered wineries:	<b>35</b>
<b>VINTAGE section</b>	
Number of registered wineries:	<b>103</b>
<b>BOTTLING section</b>	
Number of registered wineries:	<b>118</b>
<b>TOTAL number of registered wineries:</b>	<b>200</b>

### 3. QUALIFICATION OF WINE

#### 3.1. VOLUME OF QUALIFIED WINE DURING 2012

Type of wine	Total (several harvests)	Harvest 2011	
WHITE	24.004.616 L	12.358.690 L	51,48 %
ROSÉ	5.847.765 L	3.063.966 L	52,40 %
RED	23.147.845 L	16.058.715 L	69,37%
<b>TOTAL</b>	<b>53.000.226 L</b>	<b>31.481.371 L</b>	<b>59,40%</b>

#### 3.2. VOLUME OF NOT QUALIFIED WINE DURING 2012 (that did not pass the qualifying regulation)

Type of wine	Volume
WHITE	8.000 L
ROSÉ	0 L
RED	258.370 L
<b>TOTAL</b>	<b>266.370 L</b>

#### 3.3. QUALIFICATION OF HARVEST

HARVEST 2012	VERY GOOD
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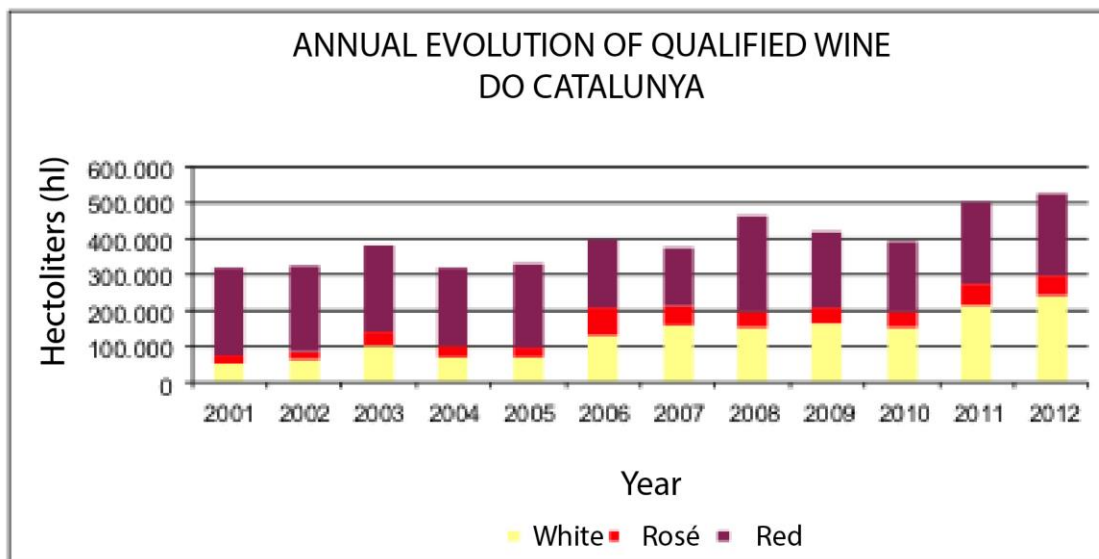
#### 3.4. EVOLUTION OF QUALIFIED WINE STOCKS (L)

Type wine	End of wine year			End of calendar year		
	31/07/11	31/07/12	Difference	31/12/11	31/12/12	Difference
White	6.245.915	5.157.100	-17,43%	7.571.350	9.312.136	22,99%
Rosé	1.547.914	1.336.300	-13,67%	2.106.431	2.831.432	34,42%
Red	17.953.197	16.080.000	-10,43%	12.207.337	11.953.110	-2,08%
<b>TOTAL</b>	<b>25.747.026</b>	<b>22.573.400</b>	<b>-12,33%</b>	<b>21.885.118</b>	<b>24.096.678</b>	<b>10,11%</b>

Data in litres

### 3.5. ANNUAL EVOLUTION OF QUALIFIED WINE

YEAR	WHITE		ROSÉ		RED		TOTAL
	HI	%	HI	%	HI	%	HI
2001	50.048,29	15,69	22.349,05	7,01	246.568,10	77,30	318.965,44
2002	65.916,67	20,28	17.832,10	5,49	241.324,00	74,24	325.072,77
2003	101.897,15	26,58	37.585,74	9,80	243.929,20	63,62	383.412,09
2004	67.996,98	21,18	32.883,11	10,24	220.163,29	68,58	321.043,38
2005	66.974,33	20,03	30.907,16	9,24	236.444,04	70,72	334.325,53
2006	129.242,22	32,34	76.794,35	19,22	193.607,10	48,44	399.643,67
2007	159.825,22	42,17	56.049,93	14,79	163.133,24	43,04	379.008,39
2008	154.738,21	33,16	41.830,73	8,97	270.030,71	57,87	466.599,65
2009	165.469,59	39,47	45.077,41	10,75	208.714,11	49,78	419.261,11
2010	150.750,33	38,49	45.302,51	11,57	195.583,87	49,94	391.636,71
2011	216.321,47	43,09	58.455,86	11,64	227.299,05	45,27	502.076,38
2012	240.046,16	47,81	58.477,65	11,65	231.478,45	46,10	530.002,26
<b>Average</b>	<b>130.768,89</b>		<b>43.628,80</b>		<b>223.189,60</b>		<b>397.587,28</b>
<b>%</b>	<b>32,89</b>		<b>10,97</b>		<b>56,14</b>		<b>100,00</b>



Difference between 2012 and 2011	
White	+10,97%
Rosé	+0,04%
Red	+1,84%
Total	+5,56%

## 4. COMERCIALIZATION OF BOTTLED WINE

### 4.1. INTERNAL MARKET/EXTERNAL MARKET 2012

Type wine	Internal Market	External market	TOTAL
White	8.574.693 L	10.462.227 L	<b>19.036.920 L</b>
Rosé	2.550.909 L	1.480.581 L	<b>4.031.490 L</b>
Red	7.475.634 L	14.972.113 L	<b>22.447.747 L</b>
<b>TOTAL</b>	<b>18.601.236 L</b>	<b>26.914.921 L</b>	<b>45.516.157 L</b>
	<b>24.801.648 bot (+6,90%)</b>	<b>35.886.561 bot (+9,82%)</b>	<b>60.688.209 bot (+8,61%)</b>

bot=bottles of 0,75 L. Between brackets: variation from 2011

**4.2. BREAKDOWN OF EXTERNAL MARKETS 2012**

Country (EU)	White (L)	Rosé (L)	Red (L)	TOTAL		% 12 vs 11
				L	Bot 0,75 L	
Austria	16.632	1.510	61.743	79.885	106.513	-16,57
Belgium	164.639	39.545	654.304	858.488	1.144.651	23,55
Bulgaria	14.805	5.693	25.632	46.130	61.507	49,21
Cyprus	5.108	743	4.338	10.189	13.585	-2,33
Czech Republic	10.386	3.520	26.755	40.661	54.215	48,31
Denmark	343.076	19.364	667.526	1.029.966	1.373.288	26,51
Estonia	103.655	4.512	125.782	233.949	311.932	-5,80
Finland	250.038	15.597	321.692	587.327	783.103	-8,41
France	80.788	31.006	561.344	673.138	897.517	49,80
Germany	780.482	207.257	2.442.343	3.430.082	4.573.443	5,47
Greece	20.925	0	10.458	31.383	41.844	4,40
Hungary	968	0	15.367	16.335	21.780	-45,66
Ireland	477.012	6.552	505.268	988.832	1.318.443	37,07
Italy	17.546	990	44.982	63.518	84.691	-3,66
Latvia	281.368	7.295	338.074	626.737	835.649	35,42
Lithuania	211.803	1.424	103.549	316.776	422.368	12,18
Luxemburg	0	518	1.333	1.851	2.468	276,22
Malta	10.711	1.463	11.588	23.762	31.683	23,63
Netherlands	816.517	320.139	1.266.355	2.403.011	3.204.015	23,52
Poland	38.833	747	242.518	282.098	376.131	32,86
Portugal	25.283	7.173	67.692	100.148	133.531	21,38
Rumania	5.267	430	9.165	14.862	19.816	-25,73
Slovakia	6.750	473	16.992	24.215	32.287	672,90
Slovenia	0	5	4.505	4.510	6.013	-37,36
Sweden	307.725	36.997	578.259	922.981	1.230.641	-3,03
United Kingdom	2.512.673	293.520	767.061	3.573.254	4.764.339	2,68
<b>Total EU</b>	<b>6.502.990</b>	<b>1.006.473</b>	<b>8.874.625</b>	<b>16.384.088</b>	<b>21.845.451</b>	<b>12,38</b>
<b>Country (Europe, not EU)</b>						
Albania	342	45	2.475	2.862	3.816	-68,38
Andorra	32.531	22.598	64.259	119.388	159.184	-16,65
Belorussia	7.156	563	10.107	17.826	23.768	27,41
Bosnia y Herzegovina	675	0	0	675	900	-42,55
Croatia	432	0	4.905	5.337	7.116	33,39
Iceland	54.745	0	28.011	82.756	110.341	41,27
Norway	273.193	1.562	748.947	1.023.702	1.364.936	11,43
Russia	4.816	135	22.595	27.546	36.728	110,31
Serbia	1.283	0	725	2.008	2.677	287,64
Switzerland	52.470	11.350	962.950	1.026.770	1.369.027	-12,01
Turkey	19.530	630	3.465	23.625	31.500	889,32
Ukraine	76.789	18.900	28.468	124.157	165.543	238,94
Vatican City	0	0	0	0	0	-100,00
<b>Total Europe not EU</b>	<b>523.962</b>	<b>55.783</b>	<b>1.876.907</b>	<b>2.456.652</b>	<b>3.275.536</b>	<b>3,38</b>



Country (AMERICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 12 vs 11
				L	Bot 0,75 L	
Anguilla	4.248	0	576	4.824	6.432	0 al 2011
Antigua and Barbuda	0	0	0	0	0	-100,00
Aruba	1.134	0	1.764	2.898	3.864	0 al 2011
Bahamas	16.335	0	9.117	25.452	33.936	91,86
Barbados	1.575	360	630	2.565	3.420	13,95
Belize	1.008	0	1.008	2.016	2.688	0,00
Bermuda	0	0	360	360	480	-46,67
Bolivia	9.338	6.795	21.465	37.598	50.131	15,20
Brazil	6.993	2.290	55.962	65.245	86.993	-15,45
Canada	359.881	2.105	335.556	697.542	930.056	8,45
Cayman Islands	2.205	0	2.016	4.221	5.628	318,75
Chile	5	45	40.172	40.222	53.629	-7,86
Colombia	3.377	3.557	17.336	24.270	32.360	20,31
Costa Rica	2.844	378	25.385	28.607	38.143	4,86
Cuba	96.651	16.983	103.500	217.134	289.512	-17,09
Dominican Republic	35.327	7.733	108.974	152.034	202.712	69,14
Ecuador	1.080	0	3.366	4.446	5.928	17,62
El Salvador	4.095	0	21.438	25.533	34.044	53,60
Grenada	180	0	248	428	571	-86,97
Guatemala	3.250	0	13.915	17.165	22.887	-12,55
Honduras	4.226	271	685	5.182	6.909	-36,80
Jamaica	13.716	1.008	13.950	28.674	38.232	29,67
Mexico	124.835	14.697	503.796	643.328	857.771	14,88
Netherlands Antilles	7.875	504	8.397	16.776	22.368	27,06
Nicaragua	1.518	0	4.356	5.874	7.832	-24,51
Panama	10.733	1.474	21.681	33.888	45.184	29,50
Peru	72	0	44.243	44.315	59.087	15,31
Puerto Rico	3.024	0	1.512	4.536	6.048	72,73
Saint Lucia	1.485	0	1.350	2.835	3.780	320,00
Saint Vincent and the Grenadines	0	0	0	0	0	-100,00
Surinam	95	189	0	284	379	0 al 2011
Trinidad and Tobago	0	0	0	0	0	-100,00
Turks and Caicos Islands	63	0	99	162	216	125,00
United States	532.308	19.641	773.737	1.325.686	1.767.581	7,09
Uruguay	378	378	2.574	3.330	4.440	0 al 2011
Venezuela	10.251	1.323	11.922	23.496	31.328	83,88
Virgin Islands	2.016	630	3.276	5.922	7.896	-27,37
<b>Total AMERICA</b>	<b>1.262.121</b>	<b>80.361</b>	<b>2.154.366</b>	<b>3.496.848</b>	<b>4.662.464</b>	<b>9,27</b>

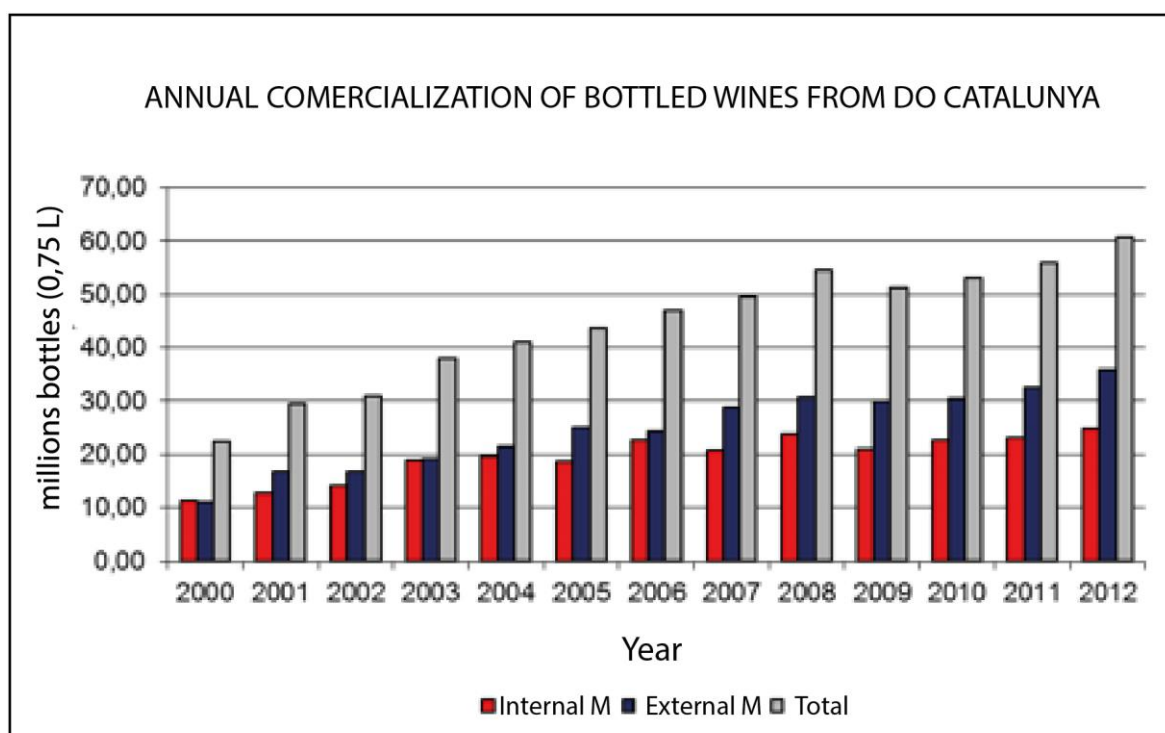
Country (ASIA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 12 vs 11
				L	Bot 0,75 L	
Armenia	0	0	0	0	0	-100,00
Bahrain	1.260	900	1.485	3.645	4.860	107,69
Bangladesh	0	0	0	0	0	-100,00
Cambodia	2.736	720	5.688	9.144	12.192	217,50
China	80.808	1.098	491.498	573.404	764.539	11,44
Georgia	0	0	0	0	0	-100,00
Hong Kong	26.096	5.918	106.316	138.330	184.440	33,36
India	18.293	2.309	22.968	43.570	58.093	37,35
Indonesia	0	0	0	0	0	-100,00
Israel	5.062	360	9.968	15.390	20.520	109,67
Japan	238.911	9.787	423.978	672.676	896.901	5,42
Jordan	585	0	0	585	780	85,71
Kazakhstan	14.486	476	10.166	25.128	33.504	158,73
Laos	90	0	990	1.080	1.440	1.100,00
Lebanon	675	0	1.035	1.710	2.280	49,61
Malaysia	11.709	630	16.088	28.427	37.903	37,71
Mongolia	0	0	270	270	360	0 al 2011
North Korea	450	0	900	1.350	1.800	-28,57
Philippines	2.405	0	7.928	10.333	13.777	18,17
Qatar	5.040	1.215	3.443	9.698	12.931	-18,52
Singapore	11.922	362	17.735	30.019	40.025	66,73
South Korea	3.585	0	97.245	100.830	134.440	49,34
Syria	0	0	0	0	0	-100,00
Taiwan	21.165	990	50.267	72.422	96.563	16,44
Thailand	2.619	0	6.660	9.279	12.372	-31,77
United Arab Emirates	26.706	5.265	30.779	62.750	83.667	-19,16
Vietnam	1.530	0	4.905	6.435	8.580	76,54
<b>Total ASIA</b>	<b>476.133</b>	<b>30.030</b>	<b>1.310.312</b>	<b>1.816.475</b>	<b>2.421.967</b>	<b>12,81</b>
<b>Country (OCEANIA)</b>						
Australia	18.396	4.590	30.917	53.903	71.871	-10,67
Australian Oceania	297	0	0	297	396	0 al 2011
French Polynesia	0	0	90	90	120	0 al 2011
New Zealand	1.350	0	3.555	4.905	6.540	-11,22
<b>Total OCEANIA</b>	<b>20.043</b>	<b>4.590</b>	<b>34.562</b>	<b>59.195</b>	<b>78.927</b>	<b>-10,13</b>

Country (AFRICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 12 vs 11
				L	Bot 0,75 L	
Angola	4.275			4.275	5.700	173,69
Congo	68	0	199	267	356	0 al 2011
Egypt				0	0	-100,00
Equatorial Guinea				0	0	-100,00
Ethiopia	360		630	990	1.320	-64,52
Gabon	46	0	109	155	207	0 al 2011
Ghana	450	225	900	1.575	2.100	0 al 2011
Guinea	504	284	1.008	1.796	2.395	127,63
Ivory Coast	95		1	96	128	1,05
Kenya	451	0	1.036	1.487	1.983	0 al 2011
Madagascar	136	0	181	317	423	0 al 2011
Mauricio	2.359	540	2.340	5.239	6.985	41,98
Morocco	5.981	576	2.656	9.213	12.284	64,84
Nigeria	1.352	1.044	7.528	9.924	13.232	-13,97
Seychelles	1.575	180	541	2.296	3.061	0,04
South Africa	63	117	243	423	564	1.410,71
Tanzania	1.513	0	1.010	2.523	3.364	186,05
Uganda	288		756	1.044	1.392	-29,27
<b>Total ÀFRICA</b>	<b>19.516</b>	<b>2.966</b>	<b>19.138</b>	<b>41.620</b>	<b>55.493</b>	<b>24,60</b>
Canary Islands, Ceuta and Melilla	1.657.439	300.387	702.217	2.660.043	3.546.724	0,76
<b>TOTAL EXTERNAL M</b>	<b>10.462.204</b>	<b>1.480.590</b>	<b>14.972.127</b>	<b>26.914.921</b>	<b>35.886.561</b>	<b>9,82</b>

### 4.3. EVOLUTION OF BOTTLED WINE COMERCIALIZATION

Year	Internal Market	External Market	Total
2000	11,35	11,10	<b>22,45</b>
2001	12,77	16,70	<b>29,47</b>
2002	14,09	16,80	<b>30,89</b>
2003	18,82	19,18	<b>38,00</b>
2004	19,64	21,44	<b>41,08</b>
2005	18,73	24,99	<b>43,72</b>
2006	22,73	24,36	<b>47,09</b>
2007	20,73	28,89	<b>49,62</b>
2008	23,74	30,79	<b>54,53</b>
2009	21,14	30,03	<b>50,50</b>
2010	22,71	30,48	<b>53,19</b>
2011	23,20	32,68	<b>55,88</b>
2012	24,80	35,89	<b>60,69</b>

Data in millions of bottles 0,75 L



Difference between 2012 and 2011	
Internal Market	+6,90%
External Market	+9,82%
TOTAL	+8,61%

## 5. SUITABLE GRAPES DO CATALUNYA. HARVEST 2012

Heavy extraction RVC (November 2012)

<b>WHITE GRAPE</b>	<b>Kg 2012</b>	<b>%</b>	<b>% vs. 2011</b>
Albariño	25.968	0,07	7,2
Chardonnay	1.165.744	3,35	-26,8
Chenin	174.450	0,50	-18,3
Garnacha blanca	3.386.103	9,74	4,3
Gewurztraminer	229.500	0,66	-21,3
Macabeo	1.523.565	4,38	51,0
Moscatel de Alejandría	3.544.137	10,19	-27,5
Moscatel de grano pequeño	161.645	0,46	-13,6
Parellada	4.973.325	14,30	3,1
Pedro Ximénez	3.840	0,01	-85,7
Riesling	53.864	0,15	-51,3
Sauvignon blanc	206.221	0,59	-31,5
Sumoll blanco	11.737	0,03	42,0
Viognier	11.500	0,03	-31,1
Xarel·lo	563.394	1,62	407,4
<b>Total white grape</b>	<b>16.034.993</b>	<b>46,11</b>	<b>-4,8</b>

<b>RED GRAPE</b>	<b>Kg 2012</b>	<b>%</b>	<b>% vs. 2010</b>
Cabernet franc	55.495	0,16	-77,6
Cabernet sauvignon	2.311.713	6,65	6,2
Cariñena (Samsó)	966.614	2,78	16,8
Garnacha tinta	4.135.925	11,89	23,4
Garnacha peluda	3.240	0,01	29,6
Garnacha tintorera	241.808	0,70	-33,3
Merlot	3.925.620	11,29	53,2
Monastrell	30.738	0,09	-62,8
Petit verdot	3.880	0,01	-16,9
Pinot noir	295.633	0,85	258,9
Sumoll	35.524	0,10	-5,7
Syrah	2.550.572	7,34	-2,1
Trepat	11.910	0,03	-50,6
Ull de llebre (Tempranillo)	4.168.576	11,99	-11,2
<b>Total red grape</b>	<b>18.737.248</b>	<b>53,89</b>	<b>9,8</b>

<b>TOTAL</b>	<b>34.772.241</b>	<b>100</b>	<b>+2,5</b>
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## **6. REGISTERED WINERIES IN DO CATALUNYA**

The full file of companies registered in the Winery Record of DO Catalunya is listed in the attached annex.