

ANNUAL RESULTS REPORT 2016



REGULATORY BOARD FOR THE DENOMINATION OF ORIGIN CATALUNYA

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CONTENTS

	<u>Page</u>
1. INTRODUCTION	2
2. REGISTERS' SITUATION	3
3. RATING OF WINES	4
4. BOTTLED WINES' MARKETING.....	6
5. SUITABLE GRAPES DO CATALUNYA. 2016 HARVEST	12
6. CELLARS/WINERIES REGISTERED UNDER THE DO CATALUNYA.....	13

1. INTRODUCTION

We are happy to present, down below, an overview of the most remarkable data from the Annual report of Denominació d'Origen CATALUNYA for this 2016 year.

The total volume of rated wines has been up to 478,898 hl, which represents a drop of 14.2% compared to the 2015 volume, and with an impact to the three colors, specially rosés and red wines. Despite this, the stocks have also gone down, both at the end of the marketing year (235,294 hl, - 23.8%) and at the end of the natural year (229,931 hl, - 6.6%). This fact means that the rated wines have been pushed to the bottling throughout this year. White wine it's the one with highest rating (49.3%), followed by red wine (40.1%) and rosé in the last position (10.6%). Of all the rated wines, 338.919 hl belong to wines from the 2015 harvest (70.8%) and the rest belong to previous vintages.

In terms of bottled wine, an amount equal to 60.3 million bottles (0.75 l) have been sold in 2016, of which 26.9 (45%) went to the domestic market and the other 33.4 million (55%) went to the international market. When we compare these numbers with last year's data, we could pinpoint a recovery of almost 3% of the domestic consumption, and a drop of 5.7% in the international markets. The final overall number of commercialization has also seen a slight increase of 2%, which equals 1.2 million bottles less than in 2015.

The main foreign markets are still in the European Union, with a total amount of 19.9 million bottles (60% of sells outside Spain), which implies a drop of the 6.5% compared to the previous year. In this list, the United Kingdom maintains the leading position, with an increase of 5.2% and reached almost 5.8 million bottles. The second place belongs to the Netherlands, with 3 million bottles, even with a fall of 25%. With a short distance comes Germany in the third position; where we are losing sales (-10.4%). After that, we find Denmark and Sweden with 1.6 million, and Lithuania and Finland with values close to a million. Outside the UE, but in mainland Europe, Switzerland and Norway are yet the main buyers, with values of 0.7 and 0.6 million bottles respectively, but with significant downturns in both cases. Other markets farther and more relevant are, once again, in the American continent: the United States (0.9 M bot.), Canada (0.83 M bot.) and Mexico (0.79 M bot.) but with losses in all the cases, especially in the US (-27%). In contrast, in the Asian continent, China experiences a rise of 18.4% (1.3 M bot.) and Japan keeps its numbers, above 900,000 bottles. Overall, the DO CATALUNYA wines have reached 119 countries around the world, confirming its drive to export.

As per the weighted suitable grapes for DO CATALUNYA 2016, the overall amount has experienced an increase of 4.9% in a harvest in which the production of the vineyards has been lower; reflecting the firm commitment of the industry to this designation of origin. We would also like to express our most sincere gratitude to the sector for trusting us.

Xavier Pié i Dols
President of the CRDO CATALUNYA
April of 2017

2. REGISTER'S SITUATION (on 12/31/16)

REGISTER OF WINEGROWERS: 5,699 winegrowers

REGISTER OF VINEYARDS (RVC): 42,985 ha

REGISTER OF WINERIES

PRODUCTION section	
Number of registered cellars:	185
STORAGE Section	
Number of registered cellars:	32
CRianza section	
Number of registered cellars:	116
BOTTLING section	
Number of registered cellars:	136
TOTAL number of registered cellars:	226

3. RATING OF WINES

3.1. VOLUME OF RATED WINE THROUGHOUT 2016

Type of wine	Total (several harvests)	2015	
WHITE	23,615,094 L	14,829,991 L	62.80%
ROSÉ	5,053,052 L	2,945,022 L	58.28%
RED	19,221,617 L	16,116,865 L	83.85%
TOTAL	47,889,763 L	33,891,878 L	70.77%

3.2. VOLUME OF NON-RATED WINE THROUGHOUT 2016 (because of failing to pass the rating tests)

Type of wine	Volume
WHITE	3,866 L
ROSÉ	1,125 L
RED	2,775 L
TOTAL	7,766 L

3.3. HARVEST RATING

2016 HARVEST	Pending
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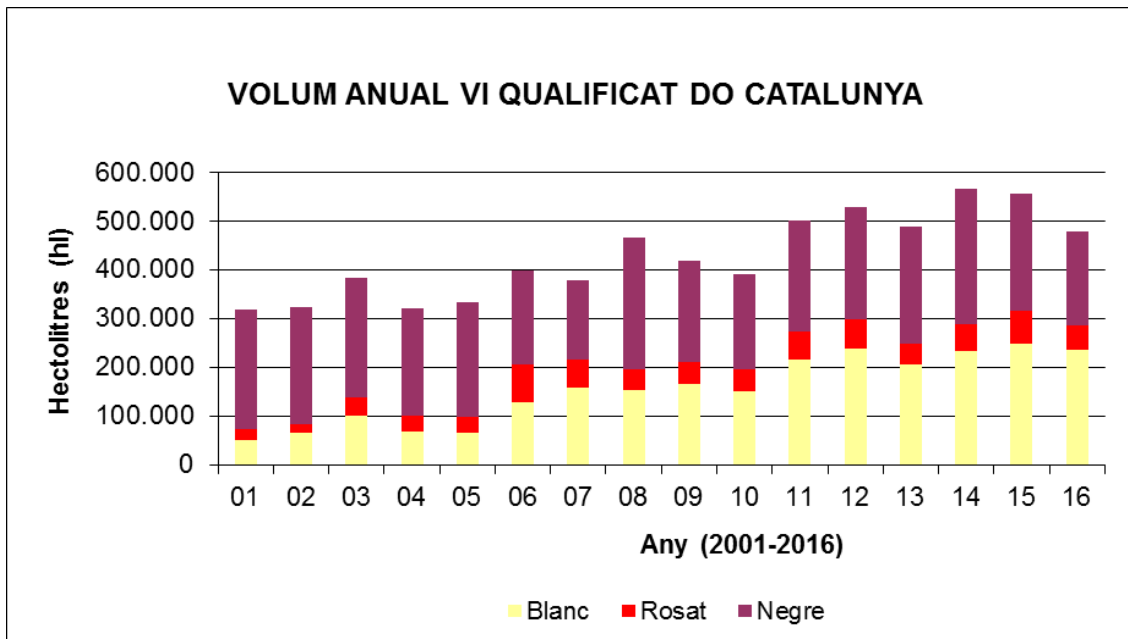
3.4. EVOLUTION OF THE STOCKS OF THE RATED WINES

Type Wine	END OF WINE YEAR			END OF NATURAL YEAR		
	07/31/15	07/31/16	Variety	12/31/15	12/31/16	Variety
White	7,650,495	5,082,705	-33.56%	8,136,992	8,473,225	4.13%
Rosé	2,440,223	1,205,621	-50.59%	1,886,716	2,120,251	12.38%
Red	20,772,414	17,241,064	-17.00%	14,583,686	12,399,607	-14.98%
TOTAL	30,863,132	23,529,390	-23.76%	24,607,394	22,993,083	-6.56%

Data in liters

3.5. ANNUAL EVOLUTION OF THE RATED WINES

YEAR	WHITE wine		ROSÉ wine		RED wine		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	45.29	58,477.65	11.03	231,478.45	43.67	530,002.26
2013	206,873.06	42.21	42,914.92	8.76	240,339.54	49.04	490,127.52
2014	233,252.25	41.14	56,808.38	10.02	276,943.14	48.84	567,003.77
2015	247,700.01	44.40	69,162.57	12.40	241,041.73	43.20	557,904.31
2016	236,159.94	49.31	50,530.52	10.55	192,216.17	40.14	478,906.63
Average	155,825.74		46,435.12		226,800.98		429,061.85
%	36.32		10.82		52.86		100.00



Comparison 2016 vs 2015	
White	-4.66%
Rosé	-26.94%
Red	-20.26%
Total	-14.16%

4. BOTTLED WINES' MARKETING

4.1. 2016 DOMESTIC MARKET / INTERNATIONAL MARKET

Type of wine	Domestic market	International market	TOTAL
White	10,841,071 L	11,913,376 L	22,754,447 L
Rosé	2,815,537 L	1,805,393 L	4,620,930 L
Red	6,516,792 L	11,332,263 L	17,849,055 L
	20,173,400 L	25,051,032 L	45,224,432 L
TOTAL	26,897,867 bot. (+2.92%)	33,401,376 bot. (-5.65%)	60,299,242 bot. (-2.01%)

bot.= 0.75 L bottles. In brackets, fluctuation from 2015

4.2. 2016 INTERNATIONAL MARKETS BREAKDOWN

Country (EU)	White (L)	Rosé (L)	Red (L)	TOTAL		% 16 vs 15
				L	0.75 l bot	
Germany	687,836	272,912	1,257,247	2,217,995	2,957,327	-10.36
Austria	20,224	2,794	16,398	39,416	52,555	-1.85
Belgium	115,890	31,274	300,546	447,710	596,947	-24.04
Bulgaria	20,115	6,075	6,435	32,625	43,500	-24.41
Croatia	81	9	477	567	756	-62.40
Denmark	593,591	169,928	471,804	1,235,323	1,647,097	-1.11
Slovakia			2,363	2,363	3,151	-58.69
Slovenia	135		648	783	1,044	-15.53
Estonia	123,365	9,877	137,420	270,662	360,883	-13.63
Finland	324,990	102,012	282,479	709,481	945,975	20.51
France	131,678	24,812	299,172	455,662	607,549	14.31
Greece	49,788	1,755	3,996	55,539	74,052	5.33
Hungary	968		703	1,671	2,228	-32.48
Ireland	435,830	45	36,348	472,223	629,631	-28.52
Italy	23,608	985	44,175	68,768	91,691	18.06
Latvia	64,103	12,133	58,673	134,909	179,879	10.95
Lithuania	417,936	9,891	311,306	739,133	985,511	-10.92
Luxemburg	1,728	3,902	8,146	13,776	18,368	57.46
Malta	3,240	1,238	11,400	15,878	21,171	6.88
Netherlands	865,807	185,389	1,196,945	2,248,141	2,997,521	-24.87
Poland	145,710	4,326	63,739	213,775	285,033	10.70
Portugal	6,161	792	9,352	16,305	21,740	-30.55
United Kingdom	3,260,714	175,880	897,311	4,333,905	5,778,540	5.16
Czech Republic	2,944	1,548	6,253	10,745	14,327	-69.96
Romania	3,893	902	3,713	8,508	11,344	-49.72
Sweden	479,595	29,123	692,300	1,201,018	1,601,357	3.55
Cyprus	5,783	675	4,005	10,463	13,951	61.44
Total EU	7,785,713	1,048,277	6,123,354	14,957,344	19,943,125	-6.53
Country (EUROPE, NOT EU)						
Albania	28,550	10,508	46,567	85,625	114,167	2,641.75
Andorra	48,298	23,671	75,948	147,917	197,223	8.67
Belarus	6,188		8,438	14,626	19,501	13.05
Bosnia and Herzegovina	272	45	713	1,030	1,373	13.94
Iceland	35,899	270	10,473	46,642	62,189	-33.73
Macedonia	68		158	226	301	0 in 2015
Monaco			1,589	1,589	2,119	2,462.90
Montenegro	360		180	540	720	0 in 2015
Norway	152,675	800	321,303	474,778	633,037	-28.66
Russia	7,710	482	57,347	65,539	87,385	-67.97
Serbia				0	0	-100.00
Switzerland	72,553	9,524	445,825	527,902	703,869	-36.99
Turkey	13,500			13,500	18,000	-58.02
Ukraine	40,605	654	27,244	68,503	91,337	36.12
Total EUROPE, NOT EU	406,678	45,954	995,785	1,448,417	1,931,223	-28.26

Country (AMERICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 16 vs 15
				L	0.75 l bot.	
Antigua and Barbuda	45			45	60	-87.50
Netherlands Antilles	3,249		2,430	5,679	7,572	197.64
Argentina			90	90	120	0 in 2015
Aruba				0	0	-100.00
Bahamas	1,044		540	1,584	2,112	-44.13
Barbados	1,548		2,849	4,397	5,863	-50.94
Belize	1,247	113	1,467	2,827	3,769	60.26
Bolivia	90		7,641	7,731	10,308	70.78
Brazil	36,000	24,345	92,291	152,636	203,515	-23.41
Canada	326,499	20,998	272,572	620,069	826,759	-9.29
Colombia	4,743	9,207	36,192	50,142	66,856	124.20
Costa Rica	10,076	189	43,421	53,686	71,581	54.75
Cuba	95,362	8,667	95,382	199,411	265,881	25.63
El Salvador	6,237		21,744	27,981	37,308	-18.43
Ecuador			855	855	1,140	0 in 2015
United States	266,456	48,275	365,857	680,588	907,451	-27.02
Grenada	135		315	450	600	-39.35
Guatemala	5,958	567	14,130	20,655	27,540	8.48
Bermuda	68		270	338	451	-37.41
Cayman Islands	4,797		6,876	11,673	15,564	143.80
Turks and Caico Islands				0	0	-100.00
Virgin Islands	1,638		2,898	4,536	6,048	-2.70
Jamaica	12,462	2,484	14,508	29,454	39,272	66.21
Mexico	97,651	10,229	485,563	593,443	791,257	-13.21
Nicaragua	2,385		2,984	5,369	7,159	54.95
Panama	3,551	540	7,250	11,341	15,121	-36.36
Paraguay	2,399		2,129	4,528	6,037	0 in 2015
Peru	1,350	113	16,119	17,582	23,443	-12.44
Dominican Republic	39,132	5,652	68,018	112,802	150,403	-46.14
Saint Vincent and the Grenadines	225		90	315	420	16.67
Saint Lucia	3,204		5,058	8,262	11,016	126.60
Uruguay	2,453		518	2,971	3,961	161.99
Venezuela	1,260	630	882	2,772	3,696	0 in 2015
Chile	2,972		75,702	78,674	104,899	46.80
Total AMERICA	934,236	132,009	1,646,641	2,712,886	3,617,181	-13.26

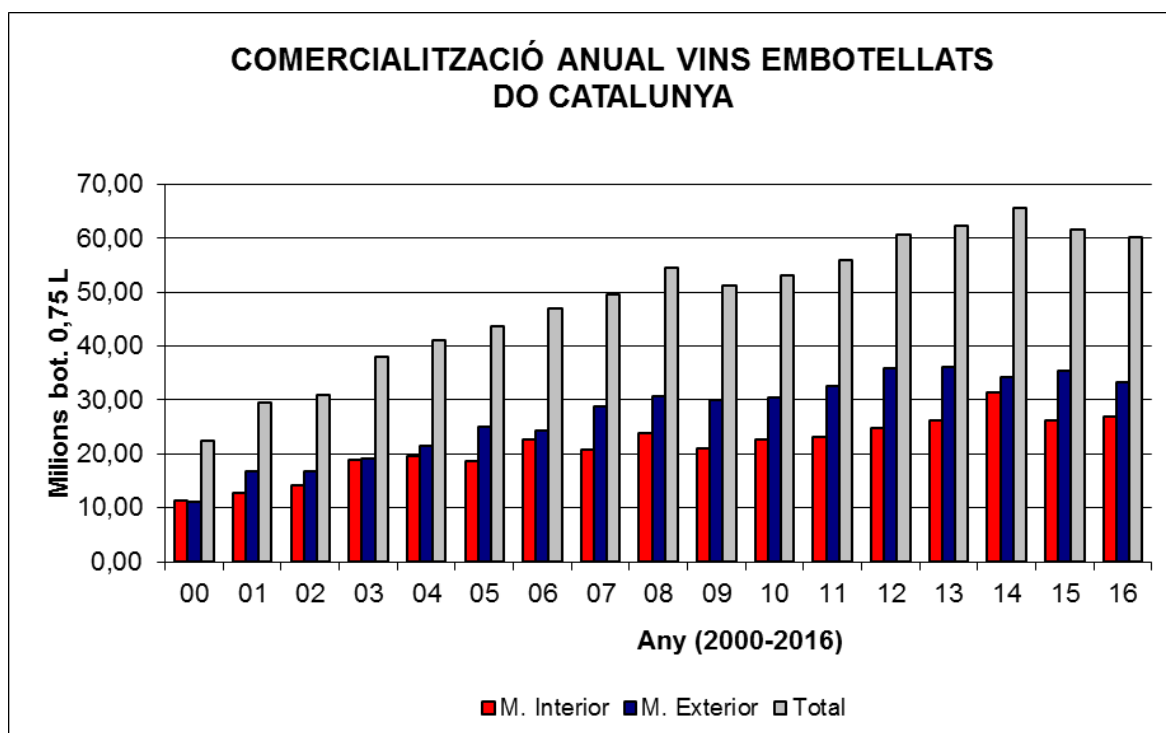
Country (ASIA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 16 vs 15
				L	0.75 l bot.	
Saudi Arabia	2,646		3,627	6,273	8,364	0 in 2015
Armenia				0	0	-100.00
Azerbaijan	122	45	342	509	679	232.68
Bahrain	2,970	1,260	4,185	8,415	11,220	24.10
Bangladesh				0	0	-100.00
Myanmar	1,811	639	8,157	10,607	14,143	0 in 2015
Cambodia	135	360	630	1,125	1,500	-66.22
South Korea	11,920	2	55,564	67,486	89,981	-40.88
United Arab Emirates	28,643	7,251	50,420	86,314	115,085	26.11
Philippines	3,063		26,599	29,662	39,549	9.95
Hong Kong	20,180	1,944	42,508	64,632	86,176	-33.77
India	13,496	2,840	25,637	41,973	55,964	-0.90
Indonesia	270		1,800	2,070	2,760	134.69
Iran	1,800	1,350	6,300	9,450	12,600	0 in 2015
Israel	6,426	1,971	5,004	13,401	17,868	97.89
Japan	238,240	7,352	439,288	684,880	913,173	-2.23
Jordan			27	27	36	-94.55
Kazakhstan	9,869	1,013	9,954	20,836	27,781	-7.54
Laos			675	675	900	-25.00
Lebanon	450		990	1,440	1,920	-31.91
Malaysia	10,521	1,494	20,633	32,648	43,531	-17.48
Mongolia			1,386	1,386	1,848	0 in 2015
Nepal	765		2,835	3,600	4,800	0 in 2015
Qatar	4,959	630	29,463	35,052	46,736	48.02
Singapore	3,740	29	9,052	12,821	17,095	-15.32
Sri Lanka	5,398	1,403	3,967	10,768	14,357	184.57
Taiwan	12,874	3	54,213	67,090	89,453	8.21
Thailand	900	540	9,306	10,746	14,328	66.99
Vietnam	1,890		1,350	3,240	4,320	-25.07
China	133,594	15,689	804,896	954,179	1,272,239	18.36
Total (ASIA)	516,682	45,815	1,618,808	2,181,305	2,908,407	5.63
Country (OCEANIA)						
Australia	2,610	14,850	15,896	33,356	44,475	1.63
Fiji	1,357	452	813	2,622	3,496	0 in 2015
New Zealand	1,011	2	3,831	4,844	6,459	-76.33
Total OCEANIA	4,978	15,304	20,540	40,822	54,429	-23.39

Country (AFRICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 16 vs 15
				L	0.75 l bot.	
Algeria	675			675	900	-57.14
Cameroon	326		2,192	2,518	3,357	0 in 2015
Cape Verde	3,114			3,114	4,152	-61.23
Congo				0	0	-100.00
Ivory Coast				0	0	-100.00
Egypt	8	27	53	88	117	-98.13
Gabon	45		90	135	180	-58.84
Ghana			5	5	7	-99.91
Equatorial Guinea	1,846	284	2,081	4,211	5,615	-9.69
Kenia	540	540	505	1,585	2,113	-60.86
Mali				0	0	-100.00
Morocco	5,706	306	3,275	9,287	12,383	29.62
Mauritius	5,607	540	2,844	8,991	11,988	29.85
Nigeria	667	2,143	59,346	62,156	82,875	30.60
Senegal				0	0	-100.00
Seychelles	2,250	180	810	3,240	4,320	1.50
South Africa	227	2	228	457	609	-97.08
Tanzania	2,394	500	2,646	5,540	7,387	62.85
Togo	1,800	450	2,700	4,950	6,600	18.90
Uganda	126		126	252	336	-81.82
Total AFRICA	25,331	4,972	76,901	107,204	142,939	-11.87
Dept. of France	742,988	122,234	211,794	1,077,016	1,436,021	143.29
Canary Islands, Ceuta and Melilla	1,496,770	390,828	638,440	2,526,038	3,368,051	-7.07
TOTAL INTERNATIONAL M.	11,913,376	1,805,393	11,332,263	25,051,032	33,401,376	-5.65

4.3. EVOLUTION OF THE BOTTLED WINES' MARKETING

Year	Domestic M.	International M.	Total
2000	11.35	11.10	22.45
2001	12.77	16.70	29.47
2002	14.09	16.80	30.89
2003	18.82	19.18	38.00
2004	19.64	21.44	41.08
2005	18.73	24.99	43.72
2006	22.73	24.36	47.09
2007	20.73	28.89	49.62
2008	23.74	30.79	54.53
2009	21.14	30.03	50.50
2010	22.71	30.48	53.19
2011	23.20	32.68	55.88
2012	24.80	35.89	60.69
2013	26.24	36.15	62.43
2014	31.42	34.22	65.64
2015	26.13	35.40	61.53
2016	26.90	33.40	60.30

Data in 0.75 L million bottles



Comparison 2016 vs 2015	
Domestic M.	+2.92%
International M.	-5.65%
TOTAL	-2.01%

5. SUITABLE GRAPES DO CATALUNYA. 2016 HARVEST

Extracted weighted grapes RVC (November, 2016)

WHITE GRAPES 2016	Kg	%	% vs 2015
Albarino	50,080	0.09	18.72
Chardonnay	2,301,527	4.31	6.90
Chenin	275,285	0.52	-15.10
Grenache blanc, white Grenache	5,256,861	9.84	8.88
Gewürztraminer	192,860	0.36	-56.52
Maccabeo	5,959,324	11.15	59.85
Malvasia from Sitges, malvasia grossa, aromatic malvasia	17,854	0.03	-42.47
Muscat of Alexandria	4,473,068	8.37	-9.75
Muscat de Frontignan	375,000	0.70	-13.60
Parellada	3,371,085	6.31	-9.81
Pedro Ximenez	8,555	0.02	22.74
Picapoll Blanc	3,848	0.01	
Riesling	165,522	0.31	86.93
Sauvignon Blanc	908,135	1.70	73.03
White Sumoll, Exquitsagos, Merseguera	18,607	0.03	-23.76
Viognier	42,545	0.08	32.78
Xarello	695,894	1.30	-62.44
Total white grapes	24,116,050	45.14	3.91
2016 BLACK GRAPES	Kg	%	% vs 2015
Cabernet Franc	129,530	0.24	-38.72
Cabernet Sauvignon	4,713,773	8.82	9.80
Cariñena, Mazuelo, black imperial	1,351,462	2.53	-7.59
Grenache	5,908,626	11.06	12.98
Garnacha Peluda	23,620	0.04	125.38
Alicante H. Bouschet	300,270	0.56	86.36
Merlot	6,187,086	11.58	-5.10
Monastrell, Mourvèdre	48,147	0.09	-2.04
Petit Verdot	3,360	0.01	-25.33
Pinot Noir	277,824	0.52	150.65
SUMOLL	151,036	0.28	24.26
Syrah	3,795,998	7.11	11.69
Trepat	16,850	0.03	-90.75
Tempranillo	6,403,291	11.99	7.31
Total black grapes	29,310,873	54.86	5.73

TOTAL	53,426,923	100	4.90
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6. CELLARS/WINERIES REGISTERED UNDER THE DO CATALUNYA

The attached Annex shows all the companies registered under the Register of Wineries of the DO CATALUNYA.