

ANNUAL REPORT 2013



DESIGNATION OF ORIGIN "CATALUNYA" REGULATORY COUNCIL

Edificio Estación Enológica Paseo Sunyer, 4-6 1º 43202 REUS

Tel. (+34) 977 32 81 03 Fax 977 32 13 57

info@do-catalunya.com www.do-catalunya.com

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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 2013 financial period.

The total volume of qualified wine has been 490.128 hl, 7,5% less than in 2012. Yet, this is offset by the qualified wine stock growth, with drops by 21% at the end of the wine year and 22% at the end of the calendar year. If we analyse it by wine colour, white wine and rosé have dropped by 13,8% and 26,6% respectively, while red wine has slightly grown by 3,8%. Proportionally, red wine comprises the majority of the qualified wine (49%), followed by white (42%) and rosé (9%).

Out of the total qualified wines, 291.229 hl (59,4%) are 2012 harvest wines and the rest correspond to other vintages, the same percentage as in the preceding financial period.

Regarding bottled wine, 62,4 million bottles (0,75 L) have been commercialized in 2013, from which 26,2 M (42%) has been distributed to the internal market and the remaining 36,2 M (58%) has been destined to the external market. Comparing these figures with those of 2012, we see growth in both markets, although the internal market rate is higher (+5,8%) than the external (+0,9%). The overall increase of commercialization in respect to the previous financial period has been 1,7 million bottles (+2,9%). Commercialization rate has increased one more year

Major export markets are within the European Union, with a total of 21,8 M bottles (60%), maintaining practically the same rate as in the previous year. Significant markets are still the United Kingdom and Germany with more than 4,5 M bottles and it keeps slowly growing. Followed by the Netherlands (3,3 M) and Sweden, Denmark and Ireland, in the same order, above 1 M. Belgium slightly decreases below one million, followed by Lithuania. Outside the EU but still within the European continent, Switzerland and Norway are still the main buyers (> 1M)

Further important markets are, one more time, United States with 1,6 M bottles (-10,9%), Canada with 0,9 M (-1,8%) and Mexico 0,8 M (-3,3%) in America. In Asia, China is strengthening as an important market exceeding one million bottles, with a 40% growing rate. While Japan drops by 45,5%, which puts it below half a million bottles. 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 CRDO CATALUNYA
April 2014

2. SITUATION OF RECORD OF ACTIVITIES (date 31/12/13)

RECORD OF VITICULTURISTS: 8.588 viticulturists

RECORD OF VINEYARDS (RVC): 47.066 ha (116.302 ac)

RECORD OF WINERIES:

WINEMAKING section	
Number of registered wineries:	170

STORAGE section	
Number of registered wineries:	32

VINTAGE section	
Number of registered wineries:	106

BOTTLING section	
Number of registered wineries:	123

TOTAL number of registered wineries:	205
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3. QUALIFICATION OF WINE

3.1. VOLUME OF QUALIFIED WINE DURING 2013

Type of wine	Total (several harvests)	Harvest 2012	
WHITE	20.687.306 L	9.511.537 L	45,98 %
ROSÉ	4.291.492 L	2.430.072 L	56,62 %
RED	24.033.954 L	17.181.247 L	71,49%
TOTAL	49.012.752 L	29.122.856 L	59,42%

3.2. VOLUME OF NOT QUALIFIED WINE DURING 2013 (that did not pass the qualifying regulation)

Type of wine	Volume
WHITE	5.000 L
ROSÉ	400 L
RED	1.272.642 L
TOTAL	1.278.042 L

3.3. QUALIFICATION OF HARVEST

HARVEST 2013	PENDING
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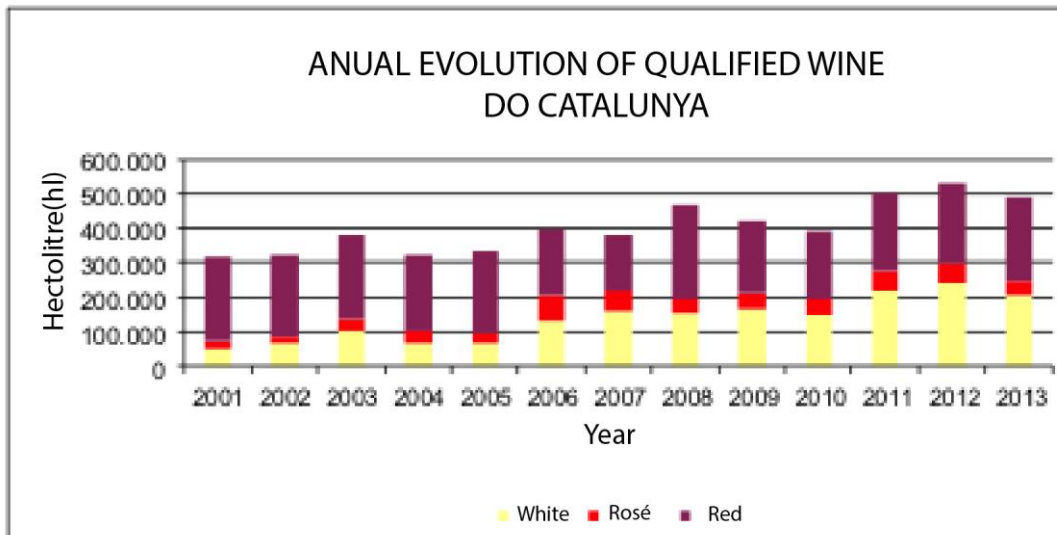
3.4. EVOLUTION OF QUALIFIED WINE STOCKS (L)

Type wine	End of wine year			End of calendar year		
	31/07/12	31/07/13	Variation	31/12/12	31/12/13	Variation
White	5.157.100	3.408.455	-34%	9.312.136	7.162.754	-23%
Rosé	1.336.300	858.422	-36%	2.831.432	2.041.597	-28%
Red	16.080.000	13.579.796	-16%	11.953.110	9.671.315	-19%
TOTAL	22.573.400	17.846.673	-21%	24.096.678	18.875.666	-22%

Data in liters

3.5. ANNUAL EVOLUTION OF QUALIFIED WINE

YEAR	WHITE WINE		ROSÉ WINE		RED WINE		TOTAL
	hl	%	hl	%	hl	%	hl
2001	50.048,29	15,69	22.349,05	7,01	246.568,10	77,3	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	9,8	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	46,1	530.002,26
2013	206.873,06	42,21	42.914,92	8,75	240.339,54	49,04	490.127,15
Average	136.623,05		43.573,89		224.508,82		404.705,76
%	33,76		10,77		55,47		100,00



Difference between 2013 and 2012	
White	-13,82%
Rosé	-26,63%
Red	+3,83%
Total	-7,52%

4. COMERCIALIZATION OF BOTTLED WINE

4.1. INTERNAL MARKET /EXTERNAL MARKET 2013

Type wine	Internal Market	External Market	TOTAL
White	9.403.085 L	10.431.642 L	19.834.727 L
Rosé	2.866.172 L	1.848.470 L	4.714.642 L
Red	7.409.977 L	14.864.982 L	22.274.959 L
	19.679.234 L	27.145.094 L	46.824.328 L
TOTAL	26.238.978 bot (+5,80%)	36.193.459 bot (+0,86%)	62.432.437 bot (+2,87%)

bot=bottles of 0,75 L. Between brackets: variation from 2012

4.2. BREAKDOWN OF EXTERNAL MARKETS 2013

Country (EU)	White (L)	Rosé (L)	Red (L)	TOTAL		% 13 vs 12
				L	Bot 0,75 L	
Austria	15.545	2.279	19.323	37.147	49.529	-53,50
Belgium	109.062	25.086	579.155	713.303	951.071	-16,91
Bulgaria	11.970	2.835	7.943	22.748	30.331	-50,69
Cyprus	4.996	1.170	4.667	10.833	14.444	6,32
Czech Republic	6.338	43.143	18.161	67.642	90.189	66,36
Denmark	378.846	11.923	509.931	900.700	1.200.933	-12,55
Estonia	160.516	4.628	211.750	376.894	502.525	61,10
Finland	232.962	15.452	330.897	579.311	772.415	-1,36
France	116.905	28.347	247.906	393.158	524.211	-41,59
Germany	678.840	239.384	2.578.235	3.496.459	4.661.945	1,94
Greece	34.605	0	5.265	39.870	53.160	27,04
Hungary	564	0	13.275	13.839	18.452	-15,28
Ireland	380.682	7.606	498.191	886.479	1.181.972	-10,35
Italy	13.722	3.497	46.780	63.999	85.332	0,76
Latvia	188.659	16.999	218.882	424.540	566.053	-32,26
Lithuania	390.436	7.512	289.253	687.201	916.268	116,94
Luxemburg	365	585	293	1.243	1.657	-32,85
Malta	3.510	225	11.048	14.783	19.711	-37,79
Netherlands	721.619	254.863	1.532.793	2.509.275	3.345.700	4,42
Poland	97.811	1.571	43.698	143.080	190.773	-49,28
Portugal	22.586	7.425	28.606	58.617	78.156	-41,47
Rumania	3.425	2.147	2.658	8.230	10.973	-44,62
Slovakia	7.065	187	3.308	10.560	14.080	-56,39
Slovenia	900	0	9.000	9.900	13.200	119,51
Sweden	442.012	47.405	674.458	1.163.875	1.551.833	26,10
United Kingdom	2.575.168	413.061	691.620	3.679.849	4.906.465	2,98
Total EU	6.599.109	1.137.330	8.577.096	16.313.535	21.751.380	-0,43
Country (EUROPE NOT EU)						
Albania	315	0	1.398	1.713	2.284	-40,15
Andorra	42.722	27.343	77.009	147.074	196.099	23,19
Belorussia	8.439	48.938	7.875	65.252	87.003	266,05
Bosnia Herzegovina	90	0	225	315	420	-53,33
Croatia	243	0	1.022	1.265	1.687	-76,30
Iceland	48.654	0	18.545	67.199	89.599	-18,80
Norway	227.229	2.808	645.448	875.485	1.167.313	-14,48
Russia	19.634	6.805	27.586	54.025	72.033	96,13
Serbia	2.205	1.215	2.376	5.796	7.728	188,65
Switzerland	24.079	9.432	934.954	968.465	1.291.287	-5,68
Turkey	18.225	0	3.285	21.510	28.680	-8,95
Ukraine	42.197	3.870	23.846	69.913	93.217	-43,69
Total EUROPE NOT EU	434.032	100.411	1.743.569	2.278.012	3.037.349	-7,27

País (AMÈRICA)	Blanco (L)	Rosado (L)	Tinto (L)	TOTAL		% 13 vs 12
				L	Bot 0,75 L	
Anguilla	0	0	0	0	0	-100,00
Antigua and Barbuda	270	0	270	540	720	0 al 2012
Aruba	0	0	0	0	0	-100,00
Bahamas	12.339	0	12.780	25.119	33.492	-1,31
Barbados	4.050	0	10.058	14.108	18.811	450,02
Belize	2.016	0	2.520	4.536	6.048	125,00
Bermuda	0	0	270	270	360	-25,00
Bolivia	180	0	1.170	1.350	1.800	-96,41
Brazil	8.343	4.745	40.050	53.138	70.851	-18,56
Canada	284.430	42.720	357.579	684.729	912.972	-1,84
Cayman Islands	2.242	0	2.879	5.121	6.828	21,32
Chile	0	0	63.009	63.009	84.012	56,65
Colombia	2.070	1.904	16.692	20.666	27.555	-14,85
Costa Rica	7.140	902	18.479	26.521	35.361	-7,29
Cuba	101.016	16.817	144.347	262.180	349.573	20,75
Dominican Republic	20.273	2.934	79.368	102.575	136.767	-32,53
Ecuador	135	0	126	261	348	-94,13
El Salvador	9.927	2	24.164	34.093	45.457	33,53
Grenada	0	0	0	0	0	-100,00
Guatemala	5.986	1.089	17.593	24.668	32.891	43,71
Honduras	5.621	589	8.469	14.679	19.572	183,27
Jamaica	2.808	504	5.094	8.406	11.208	-70,68
Mexico	103.967	11.240	507.043	622.250	829.667	-3,28
Netherlands Antilles	3.042	0	1.413	4.455	5.940	-73,44
Nicaragua	945	0	1.827	2.772	3.696	-52,81
Panama	4.050	495	11.417	15.962	21.283	-52,90
Paraguay	0	0	1.908	1.908	2.544	0 al 2012
Peru	1.193	0	17.177	18.370	24.493	-58,55
Saint Lucia	1.125	0	900	2.025	2.700	-28,57
Saint Vincent and the Grenadines	495	0	225	720	960	0 al 2012
Surinam	0	0	0	0	0	-100,00
Turks and Caicos Islands	0	0	72	72	96	-55,56
United States	384.768	24.401	772.112	1.181.281	1.575.041	-10,89
Uruguay	225	225	1.125	1.575	2.100	-52,70
Venezuela	2.016	1.134	4.284	7.434	9.912	-68,36
Virgin Islands	3.348	378	2.898	6.624	8.832	11,85
Total AMERICA	974.020	110.079	2.127.318	3.211.417	4.281.889	-8,16

Country(ASIA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 13 vs 12
				L	Bot 0,75 L	
Bahrain	2.205	1.395	2.475	6.075	8.100	66,67
Bangladesh	315	45	1.845	2.205	2.940	0 al 2012
Cambodia	1.035	270	2.340	3.645	4.860	-60,14
China	55.860	450	745.769	802.079	1.069.439	39,88
Hong Kong	16.079	4.024	84.279	104.382	139.176	-24,54
India	13.959	2.826	28.872	45.657	60.876	4,79
Indonesia	45	0	0	45	60	0 al 2012
Israel	2.318	405	3.825	6.548	8.731	-57,45
Japan	106.816	2.212	257.565	366.593	488.791	-45,50
Jordan	270	0	360	630	840	7,69
Kazakhstan	19.260	630	9.549	29.439	39.252	17,16
Laos	45	0	585	630	840	-41,67
Lebanon	990	0	1.440	2.430	3.240	42,11
Malaysia	6.390	1.215	10.260	17.865	23.820	-37,15
Mongolia	0	0	0	0	0	-100,00
North Korea	450	0	900	1.350	1.800	0,00
Philippines	4.591	0	22.563	27.154	36.205	162,79
Qatar	4.739	1.755	5.040	11.534	15.379	18,93
Singapore	11.533	2.178	29.571	43.282	57.709	44,18
South Korea	8.635	0	89.663	98.298	131.064	-2,51
Sri Lanka	542	0	630	1.172	1.563	0 al 2012
Taiwan	12.038	68	48.396	60.502	80.669	-16,46
Thailand	2.045	0	4.052	6.097	8.129	-34,29
United Arab Emirates	20.540	6.752	30.848	58.140	77.520	-7,35
Vietnam	990	0	1.575	2.565	3.420	-60,14
Total ASIA	291.690	24.225	1.382.402	1.698.317	2.264.423	-6,50
Country (OCEANIA)						
Australia	5.580	4.860	32.544	42.984	57.312	-20,26
Australian Oceania	0	0	0	0	0	-100,00
French Polynesia	0	0	675	675	900	650,00
New Zealand	252	0	4.536	4.788	6.384	-2,39
Total OCEANIA	5.832	4.860	37.755	48.447	64.596	-18,16

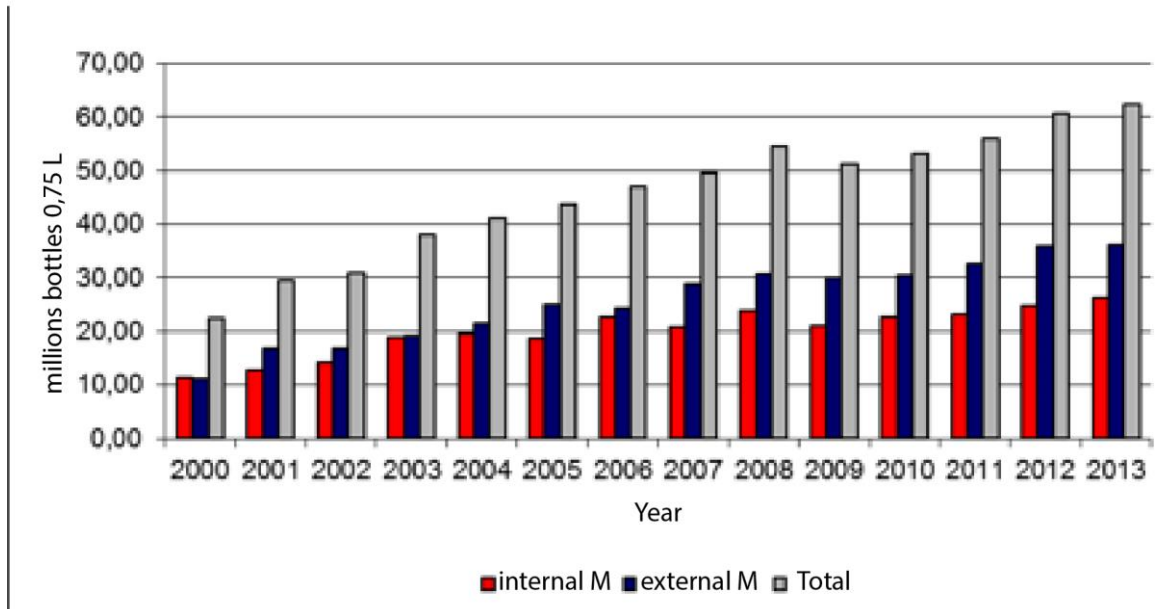
Country (AFRICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 13 vs 12
				L	Bot 0,75 L	
Angola	0	0	0	0	0	-100,00
Cameroon	1.675	0	981	2.656	3.541	0 al 2012
Cape Verde	1.764	0	0	1.764	2.352	0 al 2012
Congo	0	0	0	0	0	-100,00
Egypt	1.032	842	2.070	3.944	5.259	0 al 2012
Equatorial Guinea	776	659	2.053	3.488	4.651	0 al 2012
Ethiopia	0	0	0	0	0	-100,00
Gabon	248	0	249	497	663	220,65
Ghana	0	0	2.250	2.250	3.000	42,86
Guinea	0	0	0	0	0	-100,00
Ivory Coast	96	0	2	98	131	2,08
Kenya	1.170	0	3.105	4.275	5.700	187,49
Madagascar	135	0	321	456	608	43,85
Mauricio	3.294	972	3.852	8.118	10.824	54,95
Morocco	4.829	378	3.879	9.086	12.115	-1,38
Nigeria	5.654	4.406	26.430	36.490	48.653	267,69
Senegal	0	817	0	817	1.089	0 al 2012
Seychelles	1.170	0	1.719	2.889	3.852	25,83
South Africa	86	0	572	658	877	55,56
Tanzania	2.998	1.116	3.158	7.272	9.696	188,23
Togo	462	225	1.556	2.243	2.991	0 al 2012
Uganda	504	0	882	1.386	1.848	32,76
Total AFRICA	25.893	9.415	53.079	88.387	117.849	112,37
Canary Islands, Ceuta and Melilla	2.073.508	460.282	936.333	3.470.123	4.626.831	30,45
Dip. Francs	27.558	1.868	7.430	36.856	49.141	0 al 2012
TOTAL EXTERNAL M	10.431.642	1.848.470	14.864.982	27.145.094	36.193.459	0,86

4.3. EVOLUTION OF BOTTLED WINE COMERCIALIZATION

Year	Internal market	External market	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	36,19	62,43

Data in millions of bottles 0,75 L

ANNUAL COMERCIALIZATION OF BOTTLED WINES FROM DO CATALUNYA



Difference between 2013 and 2012	
Internal market	+5,80%
External market	+0,86%
TOTAL	+2,87%

5. SUITABLE GRAPES DO CATALUNYA. HARVEST 2014

Heavy extraction RVC (November 2013)

WHITE GRAPE	Kg 2013	%	% vs 2012
Albariño	36.150	0,08	39,2
Chardonnay	1.818.107	4,18	56,0
Chenin	255.018	0,59	46,2
Garnacha blanca	3.150.985	7,25	-6,9
Gewurztraminer	351.792	0,81	53,3
Macabeo	1.976.131	4,55	29,7
Malvasía de Sitges	180	0,00	0 al 2012
Moscatel de Alejandría	4.501.249	10,36	27,0
Moscatel de grano pequeño	323.647	0,74	100,2
Parellada	3.172.950	7,30	-36,2
Pedro Ximénez	0	0,00	-100,0
Riesling	214.582	0,49	298,4
Sauvignon blanco	566.549	1,30	174,7
Sumoll blanco	21.518	0,05	83,3
Vinyater	5.894	0,01	0 al 2012
Viognier	33.320	0,08	189,7
Xarel-lo	775.783	1,79	37,7
Total white grape	17.203.855	39,59	7,3
RED GRAPE	Kg 2013	%	% vs 2012
Cabernet franc	156.075	0,36	181,2
Cabernet sauvignon	5.204.291	11,98	125,1
Cariñena	1.393.113	3,21	44,1
Garnacha negra	4.838.318	11,13	17,0
Garnacha peluda	9.510	0,02	193,5
Garnacha tintorera	185.005	0,43	-23,5
Merlot	3.676.498	8,46	-6,3
Monastrell	49.540	0,11	61,2
Petit verdot	4.840	0,01	24,7
Pinot noir	160.114	0,37	-45,8
Sumoll	95.259	0,22	168,2
Syrah	3.785.871	8,71	48,4
Trepat	26.864	0,06	125,6
Tempranillo	6.669.834	15,35	60,0
Total red grape	26.255.132	60,41	40,1
TOTAL	43.458.987	100	25,0

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.