

ANNUAL REPORT 2014

Catalunya



DENOMINACIÓ D'ORIGEN

DESIGNATION OF ORIGIN "CATALUNYA" REGULATORY COUNCIL

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1. INTRODUCCIÓN

As every year, the Regulatory Council prepares the annual report of the *Designation of Origin Catalunya*. This year corresponds to 2014 financial period.

The total volume of qualified wine has been 567.004 hl, 15,7% higher than in 2013. Stock has also increased, both at the end of the wine year and at the end of the calendar year, by 41% and 29% respectively. Concerning wine color, all of them have increased: white wine by 12,8%, rosé by 32,4% and red wine by 15,2%. Proportionally, the latter remains the majority of the qualified wine (49%), followed by white (41%) and rosé (10%).

Out of the total qualified wines, 375.860 hl (66,3%) are 2013 harvest wines and the rest correspond to other seasons. This raises the percentage in relation to last period by 6,9%.

Regarding bottled wine, in 2014 65,6 million bottles (0,75 L) have been commercialized, from which 31,4 M (48%) has been distributed to the internal market and the remaining 34,2 M (52%) was destined to the external market. Comparing these figures with those of 2013, we can see a prominent growth in the internal market (+19,7%) and deterioration in the external market (-5,4%). The overall increase of commercialization in respect to the previous financial period has been 3,2 million bottles (+5,1%). One more year commercialization rate has increased.

Major export markets are within the European Union, with a total of 20,9 M bottles (61%), which experience a 4% fall compared to the previous year. Priority markets are still United Kingdom and Germany; the UK grows and exceeds 5 M bottles while Germany reduces its consumption by 22,5%, that is 3,6 M bottles. Followed by the Netherlands (2,9 M), Denmark (1,7 M), Sweden (1,6 M), Lithuania (1,4 M / +51,8%) and Ireland (1 M). Belgium keeps falling (-23,6% /0,7 M). Outside the EU but still within the European continent, Switzerland and Norway are still the main buyers with figures around one million bottles, yet they both show deterioration (-12,4% and -20,3%, respectively).

Further important markets are, one more time, United States and Canada with a little more than 1 M and Mexico with 0,77 M in North America. China remains the first destination country in the Asian continent exceeding a million bottles, yet with a modest growing rate (+1,4%), while Japan regains market with an increase of 48,4%, exceeding 700.000 bottles. Overall, wines from DO CATALUNYA have reached more than 110 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 their confidence they place in us year after year.

Xavier Pié i Dols
President CRDO CATALUNYA
April 2015

2. SITUATION OF RECORD OF ACTIVITIES (date 31/12/14)

RECORD OF VITICULTURISTS: 7.614 viticulturists

RECORD OF VINEYARDS (RVC): 44.533 ha (110.043 ac)

RECORD OF WINERIES:

WINEMAKING section	
Number of registered wineries:	175
STORAGE section	
Number of registered wineries:	33
VINTAGE section	
Number of registered wineries:	110
BOTTLING section	
Number of registered wineries:	128
TOTAL number of registered wineries:	210

3. QUALIFICATION OF WINES

3.1. VOLUME OF QUALIFIED WINE DURING 2013

Type of wine	Total (several harvests)	Harvest 2013	
WHITE	23.325.225 L	11.847.504 L	50,79 %
ROSÉ	5.680.838 L	4.167.610 L	73,36 %
RED	27.694.314 L	21.570.928 L	77,89%
TOTAL	56.700.377 L	37.586.042 L	66,29%

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

Type of wine	Volume
WHITE	0 L
ROSÉ	0 L
RED	157.500 L
TOTAL	157.500 L

3.3. QUALIFICATION OF HARVEST

HARVEST 2014	PENDING
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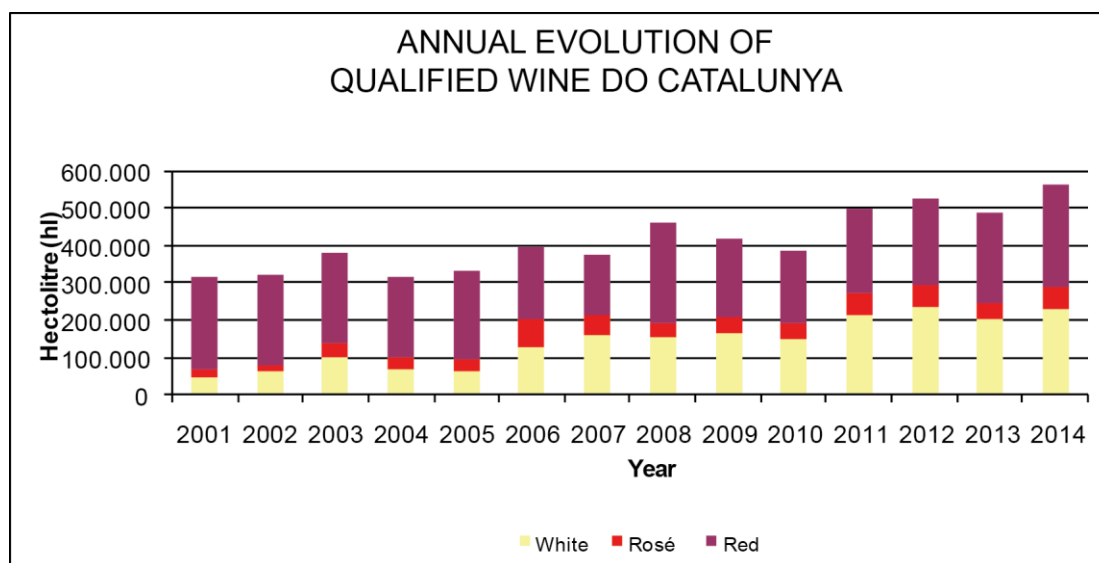
3.4. EVOLUTION OF QUALIFIED WINE STOCKS (L)

Type wine	End of wine year			End of calendar year		
	31/07/13	31/07/14	Variation rate	31/12/13	31/12/14	Variation rate
White	3.408.455	5.460.646	+60%	7.162.754	9.029.770	+26%
Rosé	858.422	1.790.032	+108%	2.041.597	1.329.769	-34%
Red	13.579.796	17.875.075	+32%	9.671.315	13.897.860	+44%
TOTAL	17.846.673	25.125.753	+41%	18.875.666	24.257.399	+29%

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
2014	233.252,25	41,14	56.808,38	10,02	276.943,14	48,84	567.003,77
Average	143.525,14		44.519,21		228.254,13		416.298,48
%	34,48		10,69		54,83		100,00



Difference 2014 vs 2013	
White	+12,75%
Rosé	+32,37%
Red	+15,23%
Total	+15,68%

4. COMERCIALIZATION OF BOTTLED WINE

4.1. INTERNAL MARKET /EXTERNAL MARKET 2014

Type of wine	Internal Market	External Market	TOTAL
White	11.688.315 L	10.855.403 L	22.543.718 L
Rosé	3.410.570 L	1.722.064 L	5.132.634 L
Red	8.463.335 L	13.090.924 L	21.554.259 L
TOTAL	23.562.220 L	25.668.391 L	49.230.611 L
	31.416.293 bot (+19,74%)	34.224.521 bot (-5,44%)	65.640.814 bot (+5,14%)

bot=bottles of 0,75 L. Between brackets: variation from 2013

4.2. BREAKDOWN OF EXTERNAL MARKETS 2013

Country (EU)	White (L)	Rosé (L)	Red (L)	TOTAL		% 14 vs 13
				L	Bot 0,75 L	
Austria	21.146	2.731	18.179	42.056	56.075	13,22
Belgium	114.492	20.832	409.223	544.547	726.063	-23,66
Bulgaria	18.788	4.500	8.028	31.316	41.755	37,66
Cyprus	3.758	90	3.159	7.007	9.343	-35,32
Czech Republic	11.184	28.961	23.650	63.795	85.060	-5,69
Denmark	461.987	81.635	760.773	1.304.395	1.739.193	44,82
Estonia	130.002	5.202	154.232	289.436	385.915	-23,20
Finland	244.231	3.782	313.905	561.918	749.224	-3,00
France	100.700	22.979	187.144	310.823	414.431	-20,94
Germany	676.197	228.637	1.805.306	2.710.140	3.613.520	-22,49
Greece	44.192	1	27.838	72.031	96.041	80,66
Hungary	693	0	1.148	1.841	2.455	-86,70
Ireland	393.519	3.015	411.137	807.671	1.076.895	-8,89
Italy	18.460	1.161	41.321	60.942	81.256	-4,78
Latvia	84.096	5.603	80.483	170.182	226.909	-59,91
Lithuania	541.674	7.385	494.172	1.043.231	1.390.975	51,81
Luxemburg	1.535	816	1.438	3.789	5.052	204,83
Malta	2.687	342	11.349	14.378	19.171	-2,74
Netherlands	744.842	333.293	1.062.434	2.140.569	2.854.092	-14,69
Poland	90.148	1.666	78.028	169.842	226.456	18,70
Portugal	31.056	7.469	47.346	85.871	114.495	46,50
Romania	3.501	1.170	8.865	13.536	18.048	64,47
Slovakia	2.727	90	13.649	16.466	21.955	55,93
Slovenia	0	0	0	0	0	-100,00
Sweden	457.517	103.431	602.324	1.163.272	1.551.029	-0,05
United Kingdom	2.930.557	338.004	756.009	4.024.570	5.366.093	9,37
Total EU	7.129.689	1.202.795	7.321.140	15.653.624	20.871.499	-4,05
Country (Europe, not EU)						
Albania	405	0	1.737	2.142	2.856	25,04
Andorra	56.774	25.364	80.910	163.048	217.397	10,86
Belorussia	6.750	0	7.313	14.063	18.751	-78,45
Bosnia Herzegovina	362	45	327	734	979	133,02
Croatia	204	9	2.697	2.910	3.880	130,04
Iceland	43.898	0	14.934	58.832	78.443	-12,45
Norway	215.194	902	481.811	697.907	930.543	-20,28
Russia	21.093	2.119	20.779	43.991	58.655	-18,57
Serbia	270	0	968	1.238	1.651	-78,64
Switzerland	74.923	11.152	762.031	848.106	1.130.808	-12,43
Turkey	18.452	2	905	19.359	25.812	-10,00
Ukraine	45.675	3.060	23.963	72.698	96.931	3,98
Total EUROPE NOT EU	484.000	42.653	1.398.375	1.925.028	2.566.704	-15,50

Country (AMERICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 14 vs 13
				L	Bot 0,75 L	
Anguilla	0	0	0	0	0	0 al 2013
Antigua y Barbuda	45	0	90	135	180	-75,00
Aruba	0	0	0	0	0	0 al 2013
Bahamas	630	0	1.215	1.845	2.460	-92,65
Barbados	999	5.400	2.646	9.045	12.060	-35,89
Belize	504	0	920	1.424	1.899	-68,61
Bermuda	0	0	180	180	240	-33,33
Bolivia	630	0	1.890	2.520	3.360	86,67
Brazil	13.401	11.438	78.592	103.431	137.908	94,65
Canada	386.775	7.368	356.522	750.665	1.000.887	9,63
Cayman Islands	2.583	0	3.024	5.607	7.476	9,49
Chile	2.259	0	62.154	64.413	85.884	2,23
Colombia	3.075	2.702	18.703	24.480	32.640	18,46
Costa Rica	7.794	189	26.075	34.058	45.411	28,42
Cuba	107.869	9.526	157.584	274.979	366.639	4,88
Dominican Republic	20.071	6.966	59.094	86.131	114.841	-16,03
Ecuador	90	0	1.080	1.170	1.560	348,28
El Salvador	5.405	1.575	22.653	29.633	39.511	-13,08
Grenada	113	0	428	541	721	0 al 2013
Guadalupe			315	315	420	0 al 2013
Guatemala	6.149	873	15.530	22.552	30.069	-8,58
Honduras	257	0	1.391	1.648	2.197	-88,77
Jamaica	6.786	0	6.678	13.464	17.952	60,17
Mexico	104.503	6.849	464.741	576.093	768.124	-7,42
Netherlands Antilles	2	1	969	972	1.296	-78,18
Nicaragua	1.716	0	4.388	6.104	8.139	120,20
Panama	7.119	1.452	19.670	28.241	37.655	76,93
Paraguay	675	0	743	1.418	1.891	-25,68
Peru	3.465	0	45.644	49.109	65.479	167,33
Puerto Rico	0	0	0	0	0	0 al 2013
Saint Lucia	1.688	0	2.925	4.613	6.151	127,80
Saint Vincent and the Grenadines	585	0	0	585	780	-18,75
Sint Maarten	0	0	0	0	0	0 al 2013
Surinam	0	0	0	0	0	0 al 2013
Tortola	0	0	0	0	0	0 al 2013
Trinidad and Tobago	0	0	0	0	0	0 al 2013
Turks and Caicos Islands	0	0	0	0	0	-100,00
United States	257.987	9.048	581.179	848.214	1.130.952	-28,20
Uruguay	0	0	0	0	0	-100,00
Venezuela	1.764	887	2.592	5.243	6.991	-29,47
Virgin Islands	504	378	2.394	3.276	4.368	-50,54
Total AMÉRICA	945.443	64.652	1.942.009	2.952.104	3.936.139	-8,07

Country (ASIA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 14 vs 13
				L	Bot 0,75 L	
Armenia	0	0	0	0	0	0 al 2013
Bahrain	4.770	3.915	4.726	13.411	17.881	120,76
Bangladesh	0	0	0	0	0	-100,00
Bhutan	0	0	0	0	0	0 al 2013
Cambodia	765	225	2.430	3.420	4.560	-6,17
China	121.014	6.795	685.558	813.367	1.084.489	1,41
Georgia	0	0	0	0	0	0 al 2013
Hong Kong	17.685	4.014	128.693	150.392	200.523	44,08
India	7.727	1.431	14.837	23.995	31.993	-47,45
Indonesia	0	0	3	3	4	-93,33
Iran	0	0	0	0	0	0 al 2013
Israel	3.930	551	4.115	8.596	11.461	31,28
Japan	170.092	3.915	369.844	543.851	725.135	48,35
Jordan	675	0	1.395	2.070	2.760	228,57
Kazakhstan	20.826	540	12.128	33.494	44.659	13,77
Laos	90	0	1.125	1.215	1.620	92,86
Lebanon	450	0	1.350	1.800	2.400	-25,93
Malaysia	20.648	2.927	25.949	49.524	66.032	177,21
Mongolia	0	0	0	0	0	0 al 2013
North Korea	0	0	0	0	0	-100,00
Philippines	2.435	0	23.929	26.364	35.152	-2,91
Qatar	4.410	1.530	19.170	25.110	33.480	117,70
Singapore	8.405	683	12.346	21.434	28.579	-50,48
South Korea	4.562	0	116.629	121.191	161.588	23,29
Sri Lanka	2.405	189	2.412	5.006	6.675	327,13
Syria	0	0	0	0	0	0 al 2013
Taiwan	19.324	0	31.773	51.097	68.129	-15,54
Thailand	2.340	0	3.164	5.504	7.339	-9,73
United Arab Emirates	30.174	5.310	36.557	72.041	96.055	23,91
Vietnam	1.350	0	2.313	3.663	4.884	42,81
Total ASIA	444.077	32.025	1.500.446	1.976.548	2.635.397	16,38
Country (OCEANIA)						
Australia	2.409	5.960	10.959	19.328	25.771	-55,03
Australian Oceania	0	0	0	0	0	0 al 2013
French Polynesia	0	0	900	900	1.200	33,33
Guam	0	0	0	0	0	0 al 2013
Kiribati	0	0	0	0	0	0 al 2013
New Zealand	1.008	900	9.432	11.340	15.120	136,84
Total OCEANIA	3.417	6.860	21.291	31.568	42.091	-34,84

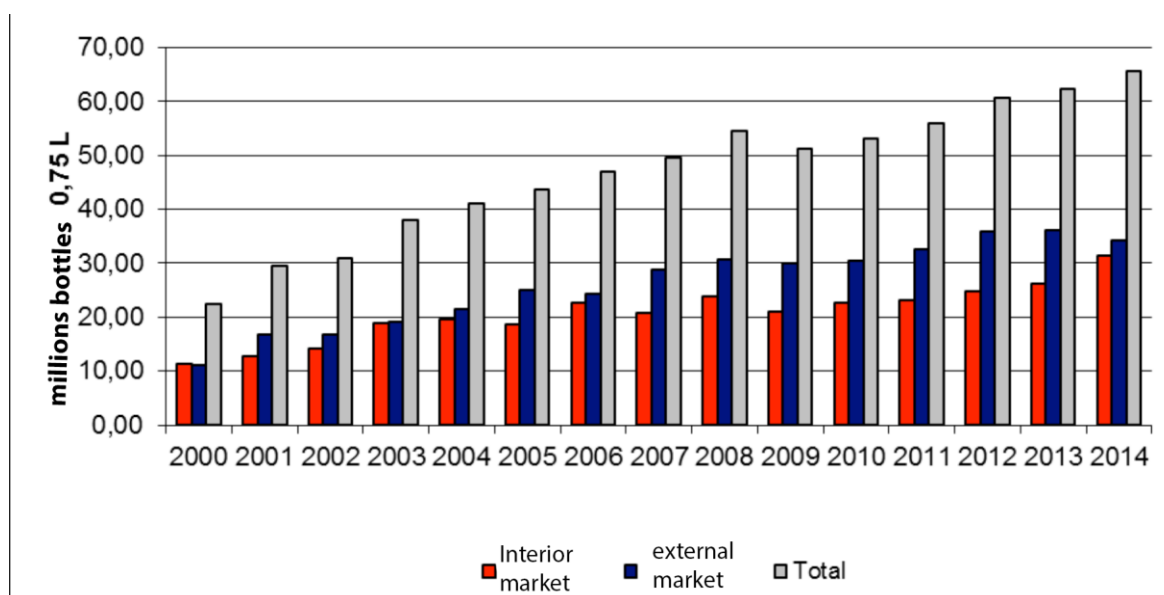
Country (AFRICA)	White (L)	Rosé (L)	Red(L)	TOTAL		%
				L	Bot 0,75 L	14 vs 13
Algeria	0	0	0	0	0	0 al 2013
Angola	0	0	2.250	2.250	3.000	0 al 2013
Benin	317	0	1.443	1.760	2.347	0 al 2013
Cameroon	0	0	0	0	0	-100,00
Cape Verde	3.276	0	0	3.276	4.368	85,71
Congo	81	0	230	311	415	0 al 2013
Egypt	1.755	1.481	4.172	7.408	9.877	87,83
Equatorial Guinea	581	473	1.220	2.274	3.032	-34,81
Ethiopia	720	0	4.320	5.040	6.720	0 al 2013
Gabon	338	0	338	676	901	36,02
Ghana	0	0	0	0	0	-100,00
Guinea	0	0	0	0	0	0 al 2013
Ivory Coast	0	0	225	225	300	129,59
Kenya	1.287	0	1.791	3.078	4.104	-28,00
Libya	0	0	0	0	0	0 al 2013
Madagascar	0	0	0	0	0	-100,00
Mauricio	1.710	189	1.836	3.735	4.980	-53,99
Morocco	3.078	153	4.010	7.241	9.655	-20,31
Nigeria	12.235	5.981	25.834	44.050	58.733	20,72
R. Center African	0	0	0	0	0	0 al 2013
Rwanda	0	0	0	0	0	0 al 2013
Senegal	0	189	90	279	372	-65,85
Seychelles	315	450	765	1.530	2.040	-47,04
South Africa	3.839	0	13.865	17.704	23.605	2.590,58
Tanzania	252	0	567	819	1.092	-88,74
Togo	1.895	1.350	4.595	7.840	10.453	249,53
Uganda	252	0	504	756	1.008	-45,45
Total AFRICA	31.931	10.266	68.055	110.252	147.003	24,74
Dip. Francs	984.951	210.207	525.119	1.720.277	2.293.703	4.567,56
Canarias, Ceuta and Melilla	831.895	152.606	314.489	1.298.990	1.731.987	-62,57
TOTAL EXTERIOR M	10.855.403	1.722.064	13.090.924	25.668.391	34.224.521	-5,44

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	36,15	62,43
2014	31,42	34,22	65,64

Data in millions of bottles 0,75 L

ANNUAL COMERCIALIZATION OF BOTTLED WINES FROM DO CATALUNYA



Difference 2014 vs 2013	
Internal market	+19,74%
External market	-5,44%
TOTAL	+5,14%

5. SUITABLE GRAPES DO CATALUNYA. HARVEST 2014

Heavy extraction RVC

WHITE GRAPE	2014	%	% vs 2013
Albariño	50.510	0,11	39,7
Chardonnay	1.785.596	3,95	-1,8
Chenin	274.836	0,61	7,8
Garnacha blanca	3.717.943	8,22	18,0
Gewurztraminer	270.080	0,60	-23,2
Macabeo	2.591.425	5,73	31,1
Malvasía de Sitges	0	0,00	-100,0
Moscatel de Alejandria	4.830.740	10,69	7,3
Moscatel de grano pequeño	337.793	0,75	4,4
Parellada	2.388.644	5,28	-24,7
Pedro Ximénez	5.000	0,01	0 al 2013
Riesling	70.293	0,16	-67,2
Sauvignon blanco	438.874	0,97	-22,5
Sumoll blanco	21.155	0,05	-1,7
Vinyater	11.389	0,03	93,2
Viognier	14.220	0,03	-57,3
Xarel-lo	1.372.479	3,04	76,9
Total white grape	18.180.977	40,22	5,7

RED GRAPE	KG	%	% vs 2013
Cabernet franc	75.040	0,17	-51,9
Cabernet sauvignon	3.857.788	8,53	-25,9
Cariñena	1.238.743	2,74	-11,1
Garnacha negra	5.497.635	12,16	13,6
Garnacha peluda	13.400	0,03	40,9
Garnacha tintorera	306.685	0,68	65,8
Merlot	5.645.722	12,49	53,6
Monastrell	78.243	0,17	57,9
Petit verdot	3.600	0,01	-25,6
Pinot noir	151.156	0,33	-5,6
Sumoll	121.451	0,27	27,5
Syrah	3.177.147	7,03	-16,1
Trepát	225.252	0,50	738,5
Tempranillo	6.633.341	14,67	-0,5
Total red grape	27.025.203	59,78	2,9

TOTAL	45.206.180	100	4,0
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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.