

ANNUAL REPORT 2015



DESIGNATION OF ORIGIN "CATALUNYA" REGULATORY COUNCIL

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INDEX

	<u>Pg.</u>
1. INTRODUCTION.....	2
2. SITUATION OF RECORD OF ACTIVITIES.....	3
3. QUALIFICATION OF WINES.....	4
4. COMERCIALIZATION OF BOTTLED WINE.....	6
5. SUITABLE GRAPES DO CATALUNYA. HARVEST 2013	12
6. RESGISTERED WINERIES IN D.O. CATALUNYA	13

1. INTRODUCTION

As every year, the Regulatory Council prepares the annual report of the *Designation of Origin Catalunya*. This year corresponds to 2015 financial period.

The total volume of qualified wine has been 557.904 hl, a bit less than in 2014 (-1,6%). Stocks at the end of the wine year (31/07/15) reached 308.631 hl, 23% more than in the previous wine year. At the end of the calendar year, however, stock from 2015 (246.074 hl) remained practically the same as in 2014, only 1% higher. Regarding wine colour, white wine and rosé increase by 6,2% and 21,8% respectively, while red wine drops by -13%. White wine has been the top qualified wine in terms of quantity (44,4%), closely followed by red wine (43,2%) and finally rosé (12,4%). Out of the total qualified wines, 388.593 hl are 2014 harvest wines (69,7%) and the rest correspond to other vintages.

Regarding bottled wine, 61,5 million bottles (0,75 L) have been commercialized during 2015, from which 26,1 M (42%) has been distributed to the internal market and the remaining 35,4 M (58%) has been destined to the external market. Comparing these figures with those of 2014, the internal market has dropped by -16,8%, which is not compensated by the rise of external markets (+3,4%). The overall decrease of commercialization compared to the previous period has been 4,1 M bottles (-6,3%).

Major export markets are still those within the European Union, with a total of 21,3 M bottles (60% of sales outside Spain), which have experienced 2,2% growth from last year. The United Kingdom remains as the most significant market with 5,5 M bottles. The Netherlands (4,0 M bot.) exceeds Germany (3,3 M bot.) as the former has experienced an important growth since 2014 (+39,8), and the latter keeps falling one more year (-8,7%). Followed by Denmark (1,7M), Sweden (1,5 M) and Lithuania (1,1 M). Outside the EU but still within the European continent, Switzerland and Norway are still the main buyers with figures of 1,1 and 0,9 M bottles respectively, but with small downturns in both cases. Further relevant markets are, one more time, in the American continent: United States (1,2 M bot.), Mexico and Canada (both with 0,9 M bot.) In Asia, China remains as first destination exceeding one million bottles, but with a modest decrease (-0,9%), and Japan has increased one more time (+28,8) exceeding 900.000 bottles. Overall, wines from DO CATALUNYA have reached more than 116 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.



Xavier Pié i Dols
President CRDO CATALUNYA
April 2016

2. SIUATION OF RECORD OF ACTIVITIES (a 31/12/15)

RECORD OF VITICULTURISTS: 6.127 viticulturists

RECORD OF VINEYARDS (RVC): 43.655 ha

RECORD OF WINERIES:

WINEMAKING section	
Number of registered wineries:	178
STORAGE section	
Number of registered wineries:	32
VINTAGE section	
Number of registered wineries:	110
BOTTLING section	
Number of registered wineries:	128
TOTAL number of registered wineries:	212

3. QUALIFICATION OF WINES

3.1. VOLUME OF QUALIFIED WINE DURING 2015

Type of wine	Total (several harvests)	Harvest 2014	
WHITE	24.770.001 L	13.108.248 L	52,92 %
ROSÉ	6.916.257 L	4.785.337 L	69,19 %
RED	24.104.173 L	20.965.757 L	86,98%
TOTAL	55.790.431 L	38.859.342 L	69,65%

3.2. VOLUME OF NOT QUALIFIED WINE DURING 2015 (that did not pass the qualifying regulation)

Type of wine	Volume
WHITE	0 L
ROSÉ	30.500 L
RED	262.945 L
TOTAL	293.445 L

3.3. QUALIFICATION OF HARVEST

HARVEST 2015	PENDING
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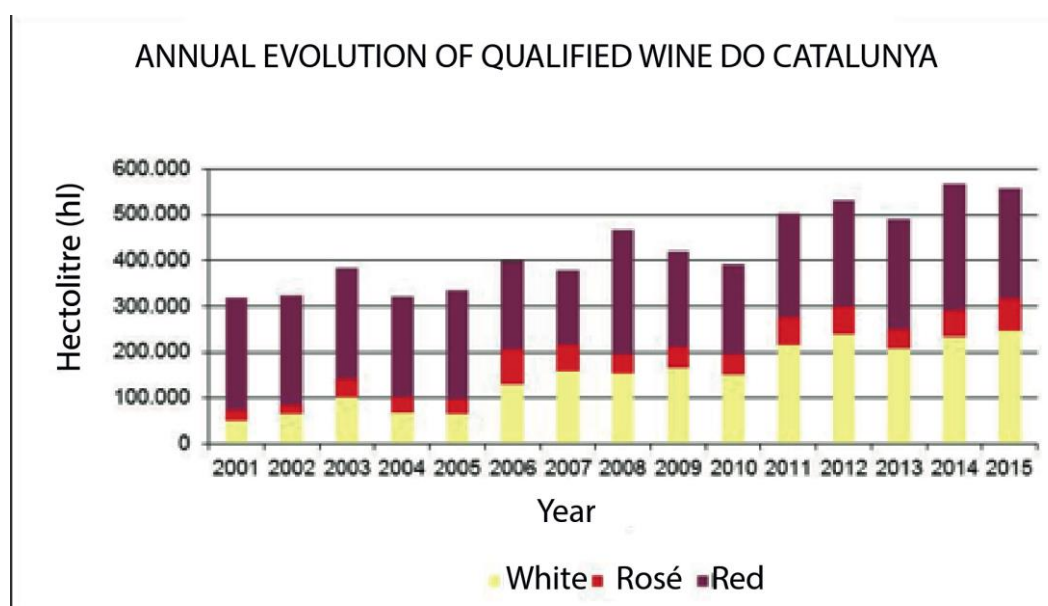
3.4. EVOLUTION OF QUALIFIED WINE STOCKS (L)

Type wine	End of wine year			End of calendar year		
	31/07/14	31/07/15	Variation	31/12/14	31/12/15	Variation
White	5.460.646	7.650.495	+40%	9.029.770	8.136.992	-10%
Rosé	1.790.032	2.440.223	+36%	1.329.769	1.886.716	+42%
Red	17.875.075	20.772.414	+16%	13.897.860	14.583.686	+5%
TOTAL	25.125.753	30.863.132	+23%	24.257.399	24.607.394	+1%

Data in liters

3.5. ANNUAL EVOLUTION OF QUALIFIED WINE

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	77,3	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
2015	247.700,01	44,40	69.162,57	12,40	241.041,73	43,20	557.904,31
Average	150.470,13		46.162,10		229.106,64		425.738,87
%	35,34		10,84		53,81		100,00



Difference between 2015 and 2014	
White	+6,19%
Rosé	+21,75%
Red	-12,97%
Total	-1,60%

4. COMERCIALIZATION OF BOTTLED WINE

4.1. INTERNAL MARKET / EXTERNAL MARKET 2014

Type wine	Internal Market	External Market	TOTAL
White	9.917.832 L	11.435.873 L	21.353.705 L
Rosé	2.724.133 L	1.895.897 L	4.620.030 L
Red	6.959.162 L	13.218.780 L	20.177.942 L
TOTAL	19.601.127 L	26.550.550 L	46.151.677 L
	26.134.836 bot (-16,81%)	35.400.733 bot (+3,44%)	61.535.569 bot (-6,25%)

bot=bottles 0,75 L. Between brackets, variation from 2014

4.2. BREAKDOWN OF EXTERNAL MARKETS 2015

COUNTRY (EU)	White (L)	Rosé (L)	Red(L)	TOTAL		% 15 vs 14
				L	Bot 0,75 L	
Austria	20.078	1.968	18.113	40.159	53.545	-4,51
Belgium	126.103	27.008	436.300	589.411	785.881	8,24
Bulgaria	18.941	4.091	20.129	43.161	57.548	37,82
Croatia	225		1.283	1.508	2.011	-48,18
Cyprus	4.388	68	2.025	6.481	8.641	-7,51
Czech Republic	6.120	3.502	26.151	35.773	47.697	-43,93
Denmark	609.918	174.238	465.069	1.249.225	1.665.633	-4,23
Estonia	149.536	8.021	155.807	313.364	417.819	8,27
Finland	325.090	8.369	255.277	588.736	784.981	4,77
France	108.634	32.095	257.886	398.615	531.487	28,25
Germany	701.463	275.985	1.496.977	2.474.425	3.299.233	-8,70
Greece	42.673	2	10.054	52.729	70.305	-26,80
Hungary	765		1.710	2.475	3.300	34,44
Ireland	373.238	45	287.364	660.647	880.863	-18,20
Italy	14.423	720	43.106	58.249	77.665	-4,42
Latvia	59.345	5.292	56.960	121.597	162.129	-28,55
Lithuania	455.202	15.238	359.334	829.774	1.106.365	-20,46
Luxemburg	495	2.099	6.155	8.749	11.665	130,91
Malta	2.633	518	11.705	14.856	19.808	3,32
Netherlands	905.071	336.310	1.750.771	2.992.152	3.989.536	39,78
Poland	105.627	1.413	86.069	193.109	257.479	13,70
Portugal	5.945	810	16.722	23.477	31.303	-72,66
Romania	4.631	2.332	9.959	16.922	22.563	25,01
Slovakia		95	5.625	5.720	7.627	-65,26
Slovenia	270		657	927	1.236	0 al 2014
Sweden	453.798	81.024	625.003	1.159.825	1.546.433	-0,30
United Kingdom	3.031.267	279.926	809.887	4.121.080	5.494.773	2,40
Total EU	7.525.879	1.261.169	7.216.098	16.003.146	21.337.528	2,23
Country (Europe, not EU)						
Albania	207	90	2.826	3.123	4.164	45,80
Andorra	43.137	21.574	71.400	136.111	181.481	-16,52
Belorussia	7.313	0	5.625	12.938	17.251	-8,00
Bosnia Herzegovina	362	2	540	904	1.205	23,16
Iceland	51.368	45	18.972	70.385	93.847	19,64
Monaco			62	62	83	0 al 2014
Norway	243.272	806	421.467	665.545	887.393	-4,64
Russia	14.724	774	189.100	204.598	272.797	365,09
Serbia	2.777	585	1.746	5.108	6.811	312,60
Switzerland	77.942	12.039	747.809	837.790	1.117.053	-1,22
Turkey	23.346	1.198	7.614	32.158	42.877	66,11
Ukraine	31.289	1.098	17.937	50.324	67.099	-30,78
Total EUROPE NOT EU	495.737	38.211	1.485.098	2.019.046	2.692.061	4,88

País (AMERICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 15 vs 14
				L	Bot 0,75 L	
Antigua and Barbuda	90	0	270	360	480	166,67
Netherlands Antilles	639	270	999	1.908	2.544	96,30
Aruba	0	0	945	945	1.260	0 al 2014
Bahamas	1.719	0	1.116	2.835	3.780	53,66
Barbados	1.705	1.800	5.458	8.963	11.951	-0,91
Belize	504	0	1.260	1.764	2.352	23,88
Bolivia	252	0	4.275	4.527	6.036	79,64
Brazil	40.716	15.444	143.136	199.296	265.728	92,68
Canada	345.555	11.856	326.157	683.568	911.424	-8,94
Colombia	3.258	1.035	18.072	22.365	29.820	-8,64
Costa Rica	6.890	0	27.801	34.691	46.255	1,86
Cuba	59.269	7.956	91.503	158.728	211.637	-42,28
El Salvador	7.374	2.970	23.958	34.302	45.736	15,76
Ecuador	0	0	0	0	0	-100,00
United States	341.508	34.115	556.953	932.576	1.243.435	9,95
Grenada	202	0	540	742	989	37,15
Guadalupe	0	0	0	0	0	-100,00
Guatemala	3.591	657	14.792	19.040	25.387	-15,57
Honduras	0	0	0	0	0	-100,00
Bermuda	0	0	540	540	720	200,00
Cayman Islands	1.512	0	3.276	4.788	6.384	-14,61
Turks and Caicos Islands	0	0	27	27	36	0 al 2014
Virgin Islands	1.890	252	2.520	4.662	6.216	42,31
Jamaica	8.262	1.080	8.379	17.721	23.628	31,62
Mexico	91.008	5.931	586.835	683.774	911.699	18,69
Nicaragua	945	0	2.520	3.465	4.620	-43,23
Panama	4.482	846	12.492	17.820	23.760	-36,90
Paraguay	0	0	0	0	0	-100,00
Peru	1.350	0	18.729	20.079	26.772	-59,11
Dominican Republic	45.720	21.111	142.590	209.421	279.228	143,14
St. Vincent and the Grenadines	135	0	135	270	360	-53,85
Saint Lucia	1.629	0	2.017	3.646	4.861	-20,96
Uruguay	162	274	698	1.134	1.512	0 al 2014
Venezuela	0	0	0	0	0	-100,00
Chile	7.183	1	46.408	53.592	71.456	-16,80
Total AMERICA	977.550	105.598	2.044.401	3.127.549	4.170.065	5,94

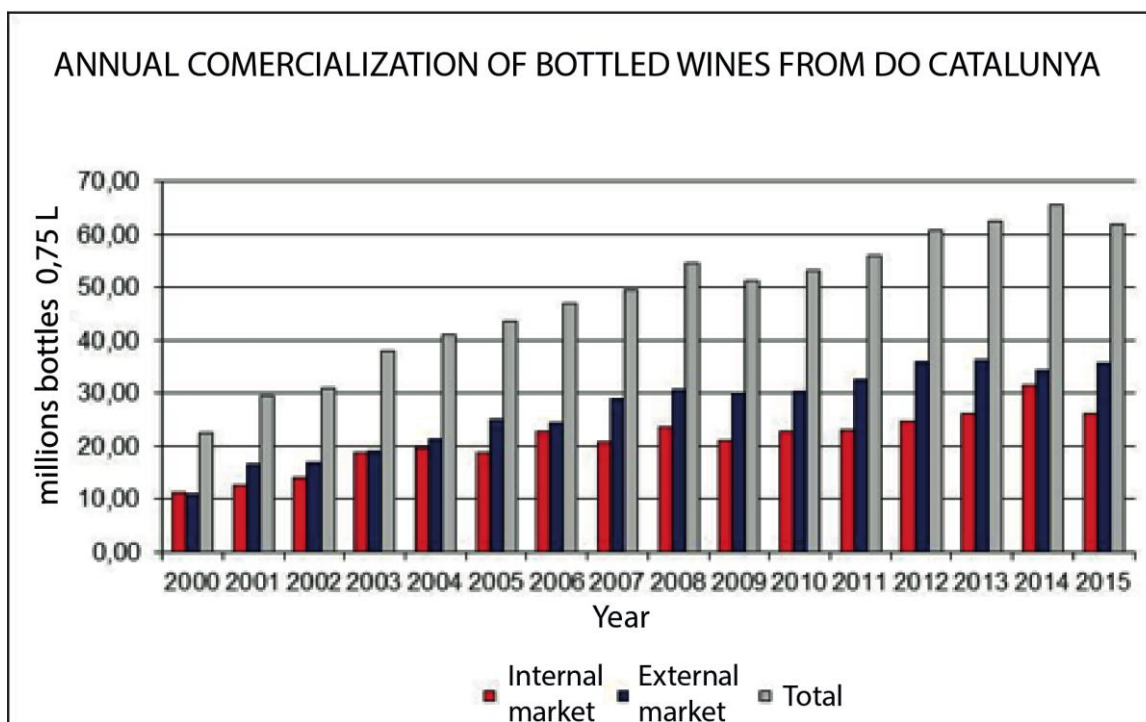
Country (ASIA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 15 vs 14
				L	Bot 0,75 L	
Armenia	945	450	5.040	6.435	8.580	0 al 2014
Azerbaijan	27	9	117	153	204	0 al 2014
Bahrain	2.461	1.845	2.475	6.781	9.041	-49,44
Bangladesh	378	45	3.114	3.537	4.716	0 al 2014
Cambodia	1.035	180	2.115	3.330	4.440	-2,63
China	73.551	6.474	726.164	806.189	1.074.919	-0,88
Hong Kong	14.807	1.756	81.020	97.583	130.111	-35,11
India	12.478	1.890	27.985	42.353	56.471	76,51
Indonesia	0	882	0	882	1.176	29.300,00
Israel	3.735	180	2.857	6.772	9.029	-21,22
Japan	266.691	7.920	425.858	700.469	933.959	28,80
Jordan	225		270	495	660	-76,09
Kazakhstan	12.442	675	9.418	22.535	30.047	-32,72
Laos	0	0	900	900	1.200	-25,93
Lebanon	738		1.377	2.115	2.820	17,50
Malaysia	13.504	1.575	24.484	39.563	52.751	-20,11
Philippines	5.203		21.775	26.978	35.971	2,33
Qatar	6.133	1.044	16.503	23.680	31.573	-5,69
Singapore	5.351	92	9.698	15.141	20.188	-29,36
South Korea	6.793	2	107.365	114.160	152.213	-5,80
Sri Lanka	1.845	0	1.939	3.784	5.045	-24,41
Taiwan	13.635		48.362	61.997	82.663	21,33
Thailand	90	0	6.345	6.435	8.580	16,91
United Arab Emirates	23.814	6.345	38.286	68.445	91.260	-4,99
Vietnam	1.701	2	2.621	4.324	5.765	18,05
Total ASIA	467.582	31.366	1.566.088	2.065.036	2.753.381	4,48
Country (OCEANIA)						
Australia	8.102	7.309	17.410	32.821	43.761	69,81
French Polynesia	0	0	0	0	0	-100,00
New Zealand	450	7.407	12.609	20.466	27.288	80,48
Total OCEANIA	8.552	14.716	30.019	53.287	71.049	68,80

Country (AFRICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 15 vs 14
				L	Bot 0,75 L	
Algeria	1.575	0	0	1.575	2.100	0 al 2014
Angola	0	0	0	0	0	-100,00
Benin	0	0	0	0	0	-100,00
Cape Verde	5.481	0	2.551	8.032	10.709	145,18
Congo	45	0	0	45	60	-85,53
Egypt	1.318	1.030	2.358	4.706	6.275	-36,47
Ethiopia	0	0	0	0	0	-100,00
Gabon	126	0	202	328	437	-51,48
Ghana	0	0	5.661	5.661	7.548	0 al 2014
Guinea Equatorial	1.212	283	3.168	4.663	6.217	105,06
Ivory Coast	1.084	0	1.764	2.848	3.797	1.165,7 8
Kenya	1.350	0	2.700	4.050	5.400	31,58
Mali	24	12	18	54	72	0 al 2014
Mauricio	3.540	774	2.610	6.924	9.232	85,38
Morocco	2.777	212	4.176	7.165	9.553	-1,05
Nigeria	911	1.396	45.285	47.592	63.456	8,04
Senegal	0	94	0	94	125	-66,31
Seychelles	1.104	360	1.728	3.192	4.256	108,63
South Africa	57	0	15.611	15.668	20.891	-11,50
Tanzania	1.512	252	1.638	3.402	4.536	315,38
Togo	1.013	450	2.700	4.163	5.551	-46,90
Uganda	378	0	1.008	1.386	1.848	83,33
Total AFRICA	23.507	4.863	93.268	121.638	162.184	10,33
Dip. Francs	335.893	28.791	78.002	442.686	590.248	-74,27
Canary Islands, Ceuta and Melilla	1.601.173	411.183	705.806	2.718.162	3.624.216	109,25
TOTAL ERXTERNAL M	11.435.873	1.895.897	13.218.780	26.550.550	35.400.733	3,44

4.3. EVOLUTION OF BOTTLED WINE COMERCIALIZATION

Year	Internal M	External 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

Data in millions of bottles de 0,75 L



Difference between 2015 and 2014	
Internal market	-16,81%
External market	+3,44%
TOTAL	-6,25%

5. SUITABLE GRAPES DO CATALUNYA. HARVEST 2015

Heavy extractions RVC (November 2015)

WHITE GRAPE 2015	Kg	%	% vs. 2014
Albarinyo	42.184	0,08	-16,48
Chardonnay	2.153.035	4,23	20,58
Chenin	324.237	0,64	17,97
Garnatxa blanca, Lledoner blanc	4.828.003	9,48	29,86
Gewürztraminer	443.606	0,87	64,25
Macabeu, Viura	3.728.113	7,32	43,86
Malvasia de Sitges, Malvasia grossa, Malvasia aromàtica	31.036	0,06	0 al 2014
Moscatell de Alexandria, Moscatell Romà	4.956.418	9,73	2,60
Moscatell de gra petit, Muscat de Frontignan	434.044	0,85	28,49
Parellada, Montonega, Montonec	3.737.849	7,34	56,48
Pedro Ximénez	6.970	0,01	39,40
Riesling	88.546	0,17	25,97
Sauvignon blanc	524.854	1,03	19,59
Sumoll blanc, Exquitsagos, Merseguera	24.407	0,05	15,37
Vinyater	0	0,00	-100,00
Viognier	32.041	0,06	125,32
Xarel.lo, Pansa blanca, Pansa rosada, Pansal, Cartoixà	1.852.609	3,64	34,98
Total white grape	23.207.952	45,57	27,65

RED GRAPE 2015	Kg	%	% vs. 2014
Cabernet franc	211.388	0,42	181,70
Cabernet sauvignon	4.293.038	8,43	11,28
Cariñena, Mazuela, Samsó	1.462.488	2,87	18,06
Garnatxa negra, Lledoner	5.229.708	10,27	-4,87
Garnatxa peluda	10.480	0,02	-21,79
Garnatxa tintorera, Alicante H Bouschet	161.120	0,32	-47,46
Merlot	6.519.371	12,80	15,47
Monastrell, Garrut, Mourvedre	49.152	0,10	-37,18
Petit verdot	4.500	0,01	25,00
Pinot noir	110.841	0,22	-26,67
Sumoll negre	121.549	0,24	0,08
Syrah	3.398.570	6,67	6,97
Trepat	182.204	0,36	-19,11
Ull de llebre, Tempranillo	5.966.943	11,72	-10,05
Total red grape	27.721.352	54,43	2,58

TOTAL	50.929.304	100	12,66
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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.