

ANNUAL RESULTS 2011



CONTROL BOARD CATALONIA GUARANTEE OF ORIGIN

Edifici Estació Enològica Passeig Sunyer, 4-6 1er 43202 REUS

Tel. 977 32 81 03 Fax 977 32 13 57

info@do-catalunya.com

www.do-catalunya.com

INDEX

	<u>pp.</u>
1. INTRODUCTION	2
2. REGISTERS SITUATION	3
3. WINES QUALIFICATION	4
4. BOTTLED WINES' MARKETING	6
5. FIT GRAPE DO CATALUNYA. HARVEST 2011	11
5. WINNERIES IN DO CATALUNYA	12

1. INTRODUCTION

As every year, the Control Board produces the Annual result of CATALONIA Guarantee of Origin, in this case, related to 2011 financial year.

The total volume of wines qualified is 502.076hl, 28.2% more comparing to 2010, with an un 28,2% superior al del 2010, with a remarkable increase of white wines (+43,5%), followed by rosé wines (+29%) and red wines (+16.2%). Red and white wines are proportionally the majority with very close **rates/values** (45.3% and 43,1%, respectively). Rosé wines complete the totally with 11.6%, a percentage similar to last year.

The whole wines qualified, 335.003 hl (66.7%) are from **2010 crop** and the rest belongs to other years.

Relating to bottled wine, a volume of 55.9 millions of ¾ litter bottles has been sold, 23.2 millions (41.5%) at national market and 32.7 (58.5%) at international one. If we compare it with numbers from 2010, we can observe an increase in both markets, more important at international one, with a +7,2%, and a little bit lower at national one, with a +2.2%. The total increase of the whole marketing, comparing to previous financial year, is 2.7 millions of bottles (+5.1%). Again, a marketing increase, breaking the historical maximum of 54.5M in 2008, with one million bottles more.

Main international markets belong to European Union, with 19.4M bottles (59,5% of the exports and with a 10.5% increase comparing to previous year). Inside EU, United Kingdom, Germany, Netherlands, Sweden and Denmark, in this importance order, are still main destinations, reversing the order between last two countries, comparing to 2010. Ireland, Belgium and Finland present as well remarkable numbers, close to a million bottles. Outside UE, but still in Europe, Switzerland and Norway keep themselves as important buyers.

Other markets, further and relevant, are USA, with 1.6M bottles (-34.4%), Canada (-3%) and Japan (+17%, around 850k bottles) and Mexico with almost ¾ of a million bottles (+9.5%).

We must consider too the Chinese emerging market, growing up 104.8%, getting close to 700.000 bottles.

Altogether, DO CATALUNYA wines arrived to more than 100 countries all over the world.

These results come from the effort of many vine growers and wineries who work with us and to whom we want to thank their confidence to us.



CONSELL
REGULADOR
DENOMINACIÓ
D'ORIGEN
CATALUNYA

Xavier Pié i Dols
President CRDO CATALUNYA
March 2012

2. REGISTERS SITUATION (on 31/12/11)

VINE GROWERS REGISTER: 9.561 vine growers

VINE YARDS REGISTER (RVC): 51.881 ha

WINERIES REGISTER:

PRODUCTION section	
Wineries in:	169
STORAGE section	
Wine cellars in:	36
AGING section	
Wineries in:	102
BOTTLING section	
Wineries in:	119
Altogether wineries and wine cellars in:	203

3. WINES QUALIFICATION

3.1. VOLUME OF QUALIFIED WINE IN 2011

Type of Wine	Total (various crops)	Crop 2010	
WHITE	21.632.147 L	13.342.535 L	61,68 %
ROSÉ	5.845.586 L	3.362.638 L	57,52 %
RED	22.729.905 L	16.795.191 L	73,89%
TOTAL	50.207.638 L	33.500.364 L	66,72%

3.2. VOLUME OF NON QUALIFIED WINE IN 2011
 (For not passing the standard controls of qualification)

Sort of wine	Volume
WHITE	61.200 L
ROSÉ	10.875 L
RED	93.300 L
TOTAL	165.375 L

3.3. CROP QUALIFICATION

CROP 2011	UNRESOLVED
-----------	-------------------

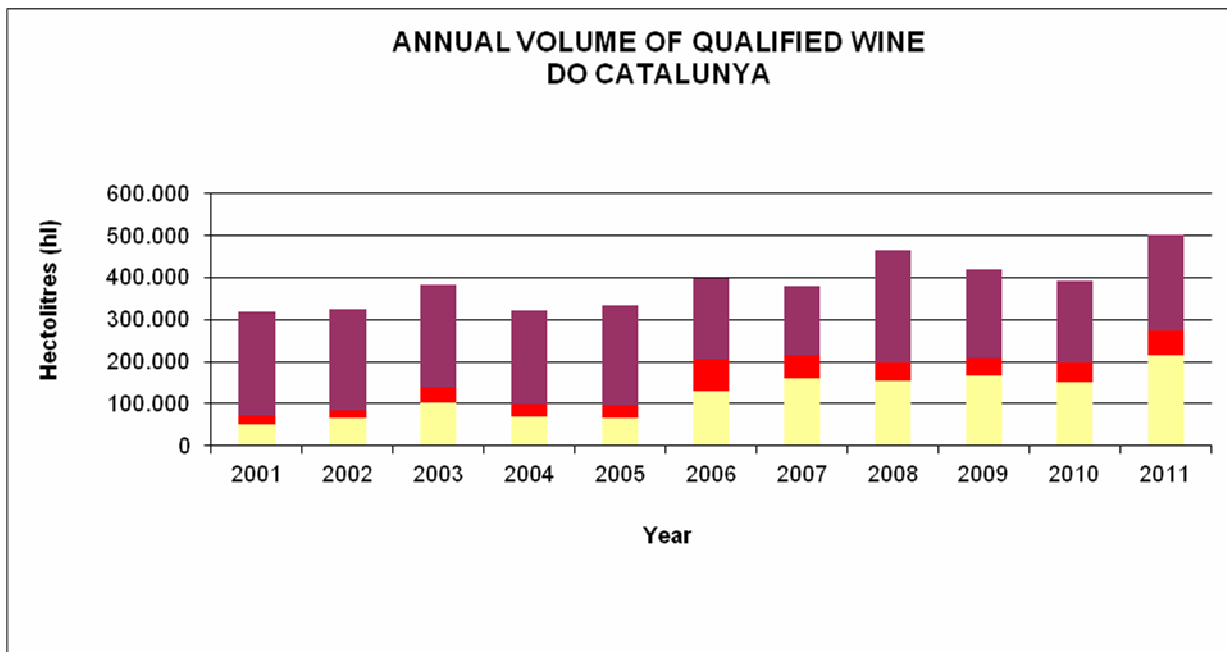
3.4. WINE EXISTENCES ANNUAL EVOLUTION (L)

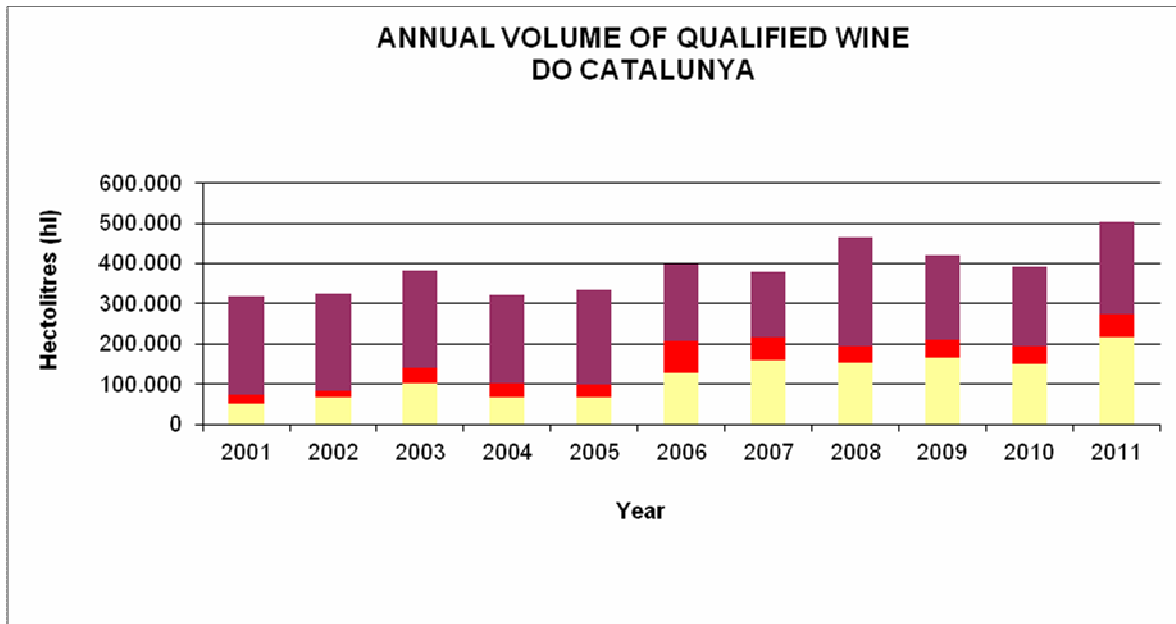
Sort of wine	Wine Yard campaign ending			Natural Year ending		
	31/07/10	31/07/11	Variation	31/12/10	31/12/11	Variation
White	4.401.787	6.245.915	41,89%	7.119.621	7.571.350	6,34%
Rosé	1.572.547	1.547.914	-1,57%	2.430.084	2.106.431	-13,32%
Red	22.242.521	17.953.197	-19,28%	15.587.876	12.207.337	-21,69%
TOTAL	28.216.855	25.747.0265	-8,75%	25.137.581	21.885.118	-12,94%

Statistics in litres

3.5. EVOLUCIÓ ANUAL DE VINS QUALIFICATS

ANY	Vi BLANC		Vi ROSAT		Vi NEGRE		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
Mitjana	120.834,59		42.278,90		222.436,06		385.549,56
%	31,34		10,97		57,69		100,00





White Rosé Red

Comparative 2011 vs 2010	
White	+43,50%
Rosé	+29,00%
Red	+16,20%
Total	+28,20%

4. BOTTLED WINES' MARKETING

4.1. NATIONAL MARKETING / INTERNATIONAL MARKETING 2011

Sort of wine	National Market	International Market	TOTAL
White	7.463.967 L	9.041.102 L	16.505.069 L
Rosé	2.730.556 L	1.584.201 L	4.314.757 L
Red	7.205.717 L	13.883.737 L	21.089.454 L
TOTAL	17.400.240 L	24.509.040 L	41.909.280 L
	23.200.320 bot (+2,16%)	32.678.720 bot (+7,20%)	55.879.040 bot (+5,05%)

bot= 0,75l bottles. In brackets, variation versus 2010

4.2. INTERNATIONAL MARKETS BREAKDOWN 2011

Country	White (L)	Rosé (L)	Red (L)	TOTAL		% 11 vs 10
				L	Bot 0,75 L	
Germany	607.848	205.648	2.438.782	3.252.278	4.336.371	10,64
Austria	17.190	2.365	76.200	95.755	127.673	50,97
Belgium	134.220	38.297	522.324	694.841	926.455	15,39
Bulgaria	12.380	3.015	15.521	30.916	41.221	108,19
Denmark	336.017	28.113	450.025	814.155	1.085.540	-20,92
Slovakia	518	149	2.466	3.133	4.177	-45,79
Slovenia	0	0	7.200	7.200	9.600	0 al 2010
Estonia	118.374	9.462	120.510	248.346	331.128	237,22
Finland	230.445	5.100	405.726	641.271	855.028	4,06
France	97.706	26.777	324.884	449.367	599.156	24,05
Greece	23.895	0	6.165	30.060	40.080	33,14
Hungary	360	810	28.890	30.060	40.080	943,75
Ireland	363.510	2.907	355.004	721.421	961.895	14,31
Italy	16.171	990	48.771	65.932	87.909	-3,73
Latvia	242.518	4.025	216.277	462.820	617.093	108,07
Lithuania	204.051	4.770	73.553	282.374	376.499	92,47
Luxemburg	9	100	383	492	656	89,23
Malta	2.732	1.076	15.413	19.221	25.628	-8,74
Netherlands	672.068	392.209	881.101	1.945.378	2.593.837	11,04
Poland	70.098	1.229	140.993	212.320	283.093	16,71
Portugal	22.616	10.049	49.840	82.505	110.007	-24,34
Country	White (L)	Rosé (L)	Red (L)	TOTAL		% 11 vs 10
				L	Bot 0,75 L	

United Kingdom	2.086.105	247.880	1.145.870	3.479.855	4.639.807	4,18
Czech Republic	5.541	3.278	18.598	27.417	36.556	-18,64
Romania	4.977	383	14.652	20.012	26.683	129,57
Sweden	351.300	62.181	538.324	951.805	1.269.073	2,10
Cyprus	5.463	1.247	3.722	10.432	13.909	29,33
Total UE	5.626.112	1.052.060	7.901.194	14.579.366	19.439.155	10,54
Albania	968	81	8.001	9.050	12.067	471,34
Andorra	36.635	32.243	74.367	143.245	190.993	-4,95
Belarus	6.589	0	7.402	13.991	18.655	49,91
Bosnia Herzegovina	590	135	450	1.175	1.567	0,43
Vatican City	0	0	8.145	8.145	10.860	0 al 2010
Croatia	135	0	3.866	4.001	5.335	70,91
Island	38.303	0	20.279	58.582	78.109	49,74
Macedonia	0	0	0	0	0	0 al 2010
Montenegro	0	0	0	0	0	-100,00
Norway	261.998	2.571	654.100	918.669	1.224.892	-3,12
Russia	1.080	2	12.016	13.098	17.464	-92,56
Serbia	518	0	0	518	691	-70,32
Switzerland	33.193	14.009	1.119.718	1.166.920	1.555.893	27,12
Turkey	451	0	1.937	2.388	3.184	-67,24
Ukraine	23.333	3.780	9.518	36.631	48.841	-33,23
Total EUROPA NO UE	403.793	52.821	1.919.799	2.376.413	3.168.551	2,61
Anguilla	0	0	0	0	0	0 al 2010
Antigua and Barbuda	846	252	1.350	2.448	3.264	44,34
Netherlands Antilles	6.516	549	6.138	13.203	17.604	266,75
Aruba	0	0	0	0	0	-100,00
Bahamas	5.841	0	7.425	13.266	17.688	5.164,29
Barbados	653	630	968	2.251	3.001	-17,33
Belize	1.008	0	1.008	2.016	2.688	-20,00
Bolivia	5	2	32.630	32.637	43.516	0 al 2010
Brazil	5.985	1.130	70.056	77.171	102.895	57,46
Canada	240.717	32.992	369.483	643.192	857.589	-3,01
Colombia	4.657	900	14.616	20.173	26.897	8.865,78
Costa Rica	5.495	505	21.282	27.282	36.376	1,89
Cuba	67.779	18.605	175.522	261.906	349.208	-36,54
El Salvador	1.305	0	15.318	16.623	22.164	-44,29
Ecuador	630	0	3.150	3.780	5.040	-64,94
United States	543.051	23.897	671.007	1.237.955	1.650.607	-34,40
Granada	1.233	504	1.548	3.285	4.380	461,54
Guatemala	1.485	189	17.955	19.629	26.172	12,05
Honduras	4.113	1.175	2.912	8.200	10.933	1,62
Bermuda Islands	225	0	450	675	900	-37,50
Caiman Islands	504	0	504	1.008	1.344	60,00
Turks and Caicos Islands	45	0	27	72	96	-89,19
Country	White (L)	Rosé (L)	Red (L)	TOTAL		%
				L	Bot 0,75 L	11 vs 10

Virgin Islands	3.384	378	4.392	8.154	10.872	144,20
Jamaica	8.235	1.197	12.681	22.113	29.484	692,58
Mexico	94.303	833	464.843	559.979	746.639	9,48
Nicaragua	2.534	189	5.058	7.781	10.375	685,96
Panama	12.366	720	13.082	26.168	34.891	13,77
Paraguay	0	0	0	0	0	-100,00
Peru	126	0	38.305	38.431	51.241	137,45
Puerto Rico	1.901	0	725	2.626	3.501	4,21
Dominican Republic	22.343	3.690	63.855	89.888	119.851	-18,45
Saint Maarten	0	0	0	0	0	-100,00
St. Vincent and Grenadines	450	0	180	630	840	0 al 2010
Santa Lucia	0	0	675	675	900	-87,50
Surinam	0	0	0	0	0	-100,00
Tortola	0	0	0	0	0	-100,00
Trinity and Tobago	0	68	540	608	811	50,12
Uruguay	0	0	0	0	0	-100,00
Venezuela	3.962	0	8.816	12.778	17.037	111,91
Chile	19	45	43.588	43.652	58.203	4,23
Total AMERICA	1.041.716	88.450	2.070.089	3.200.255	4.267.007	-17,18
Armenia	2.700	932	1.125	4.757	6.343	0 al 2010
Bahrain	630	495	630	1.755	2.340	-75,16
Bangladesh	315	0	540	855	1.140	0 al 2010
Bhutan	0	0	0	0	0	0 al 2010
Cambodia	1.125	315	1.440	2.880	3.840	-54,29
South Corea	3.342	225	63.950	67.517	90.023	221,77
North Corea	945		945	1.890	2.520	0 al 2010
United Arab Emirates	41.287	7.416	28.923	77.626	103.501	-60,53
Filipinas	1.611	99	7.034	8.744	11.659	15,80
Georgia	23	0	0	23	31	0 al 2010
Hong Kong	9.135	2.745	91.847	103.727	138.303	76,00
India	13.536	1.580	16.605	31.721	42.295	0,09
Indonesia	90	0	153	243	324	0 al 2010
Iran	0	0	0	0	0	-100,00
Israel	1.802	1	5.537	7.340	9.787	-43,39
Japan	175.145	14.571	448.366	638.082	850.776	16,99
Jordan	0	0	315	315	420	-73,53
Kazakhstan	6.188	0	3.524	9.712	12.949	0 al 2010
Laos	0	0	90	90	120	-33,33
Lebanon	315	0	828	1.143	1.524	-2,31
Malaysia	10.742	1.260	8.640	20.642	27.523	127,08
Oman	9	0	5	14	19	0 al 2010
Qatar	5.963	2.700	3.240	11.903	15.871	5,67
Singapore	5.283	2	12.720	18.005	24.007	45,77

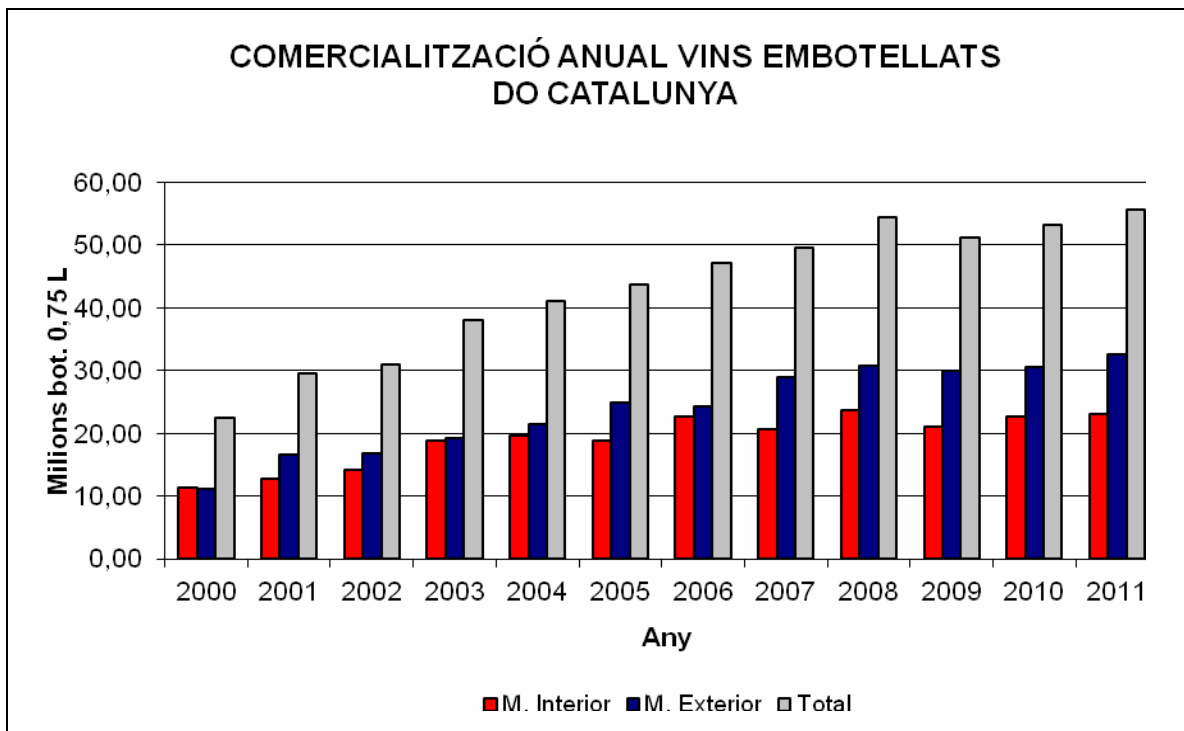
Country	White (L)	Rosé (L)	Red (L)	TOTAL		%
				L	Bot 0,75 L	11 vs 10

Syria	675	450	6.075	7.200	9.600	-31,91
Sri Lanka	0	0	0	0	0	-100,00
Taiwan	11.327	0	50.869	62.196	82.928	-9,09
Thailand	1.818	513	11.268	13.599	18.132	12,45
Vietnam	855	0	2.790	3.645	4.860	-69,18
China	53.201	2.252	459.098	514.551	686.068	104,83
Total ASIA	348.062	35.556	1.226.557	1.610.175	2.146.900	25,96
Australia	12.155	3.600	44.586	60.341	80.455	10,79
Guam	0	0	0	0	0	0 al 2010
Kiribati	0	0	0	0	0	0 al 2010
New Zeland	1.350	0	4.175	5.525	7.367	47,57
French Polynesia	0	0	0	0	0	-100,00
Total OCEANIA	13.505	3.600	48.761	65.866	87.821	11,80
Algeria	0	0	0	0	0	-100,00
Angola	225	0	1.337	1.562	2.083	-48,95
Cape Verde	0	0	0	0	0	0 al 2010
Ivory Coast	95	0	0	95	127	-66,67
Egypt	684	0	1.260	1.944	2.592	-68,24
Ethiopia	450	0	2.340	2.790	3.720	0 al 2010
Gambia	0	0	0	0	0	0 al 2010
Ghana	0	0	0	0	0	-100,00
Guinea	347	95	347	789	1.052	0 al 2010
Guinea Equatorial	224	190	315	729	972	478,57
Kenya	0	0	0	0	0	0 al 2010
Libya	0	0	0	0	0	0 al 2010
Morocco	3.033	450	2.106	5.589	7.452	-11,54
Mauricio	810	810	2.070	3.690	4.920	-23,89
Nigeria	833	2	10.700	11.535	15.380	8.444,44
Central African Republic	0	0	0	0	0	0 al 2010
Ruanda	0	0	0	0	0	0 al 2010
Seychelles	675	540	1.080	2.295	3.060	410,00
South Africa	9	5	14	28	37	-89,82
Tanzania	504	0	378	882	1.176	-58,65
Uganda	594	0	882	1.476	1.968	17,14
Total AFRICA	8.483	2.092	22.829	33.404	44.539	27,03
Dep. Francos	3.517	0	171	3.688	4.917	33,65
Canary Islands, Ceuta & Melilla	1.595.888	349.636	694.349	2.639.873	3.519.831	24,08
TOTAL INTERNATIONAL MARKET	9.041.076	1.584.215	13.883.749	24.509.040	32.678.720	7,20

4.3. BOTTLED WINES' MARKETING EVOLUTION

Year	National Market	International 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

Statistics in millions of 0,75l bottles



Comparative 2011 vs 2010	
National M.	+2,16%
International Market	+7,20%

5. FIT GRAPE DO CATALUNYA. HARVEST 2011

Extraction RVC (November 2011)

WHITE GRAPE	Kg	%	% vs 2010
Albarinyo	24.230	0,07	-53,7
Chardonnay	1.593.159	4,70	35,8
Chenin	213.601	0,63	19,2
Garnatxa blanca	3.246.081	9,57	21,6
Gewurztraminer	291.540	0,86	-25,6
Macabeu	1.009.185	2,98	39,6
Moscatell d'Alexandria	4.885.746	14,41	24,3
Moscatell de gra petit	187.005	0,55	-4,1
Parellada	4.823.224	14,22	32,3
Pedro Ximénez	26.840	0,08	671,3
Riesling	110.590	0,33	-16,9
Sauvignon blanc	300.858	0,89	-3,5
Sumoll blanc	8.265	0,02	30,4
Viognier	16.690	0,05	270,9
Xarel-lo	111.040	0,33	-64,6
Total white grape	16.848.054	49,68	22,7
RED GRAPE	Kg	%	% vs 2010
Cabernet franc	247.812	0,73	5,0
Cabernet sauvignon	2.176.041	6,42	-0,4
Carinyena	827.557	2,44	53,5
Garnatxa negra	3.351.537	9,88	-2,6
Garnatxa peluda	2.500	0,01	-92,2
Garnatxa tintorera	362.415	1,07	49,2
Merlot	2.562.335	7,56	4,4
Monastrell	82.551	0,24	-14,1
Petit verdot	4.670	0,01	48,7
Pinot noir	82.380	0,24	-10,9
Sumoll	37.673	0,11	-58,8
Syrah	2.606.192	7,69	12,0
Trepat	24.110	0,07	-40,3
Ull de llebre	4.694.842	13,84	8,8
Total red grape	17.062.615	50,32	6,0
TOTAL	33.910.669	100	+13,7

6. WINNERIES IN DO CATALUNYA

Attached, there is the list with all the companies entered in the DO Catalunya Wineries and Wine Cellars Register.