

## ANNUAL RESULTS REPORT 2017

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### REGULATORY BOARD FOR THE DENOMINATION OF ORIGIN CATALUNYA

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

Tel. 977 32 81 03 Fax 977 32 13 57

[info@do-catalunya.com](mailto:info@do-catalunya.com) [www.do-catalunya.com](http://www.do-catalunya.com)

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## 1. INTRODUCTION

We are happy to present, down below, an overview of the most remarkable data from the Annual report of Denomination of Origin CATALUNYA for this 2017 year.

The total volume of rated wines has been up to 504.662 hl, which represents a rise of 5,4% compared to the 2016 volume, and with an impact to the white and red wines ones. Despite this, the stocks have been stable (239.540 hl, +1,8%) but going down at the end of the year (177.289 hl, -22,9%). This fact maybe has happened because of the short 2017 harvest (-16,8%). White wine is still the one with highest rating (49,2%), followed by red wine (41,5%) and rosé in the last position (9,3%). Of all the rated wines, 316.982 hl belong to wines from 2016 harvest (62,8%) and the rest belong to previous vintages.

In terms

In terms of bottled wine, an amount equal to 62,4 million bottles (0.75 l) have been sold in 2017, of which 29,5 (47%) went to the domestic market and the other 32,9 million (53%) went to the international market. When we compare these numbers with last year's data, we could pinpoint a growth of almost 10% of the domestic consumption, and a slight drop of 1,5% in the international markets. The final overall number of commercialization increases 3,6%, which equals 1.2 million bottles more than in 2016.

The main foreign markets are still in the European Union, with a total amount of 19,1 million bottles (58% of sells outside Spain), which implies a drop of the 4,1% compared to the previous year. In this list, the United Kingdom maintains the leading position, with a 5,2 million of bottles in spite of having a drop of 10,4%. Germany recovers the second place after growing 6,4%, with 3,1 million of bottles.

The third place belongs to Netherlands, with 2,4 million of bottles even with a fall of 21%. Denmark and Sweden come after that, with values close to 1,5 million of bottles, Lithuania with 1,4 million of bottles and France and Finland with values up to 0,9 million of bottles. Outside the UE, but in mainland Europe, Switzerland and Norway are yet the main buyers, with values of 1 and 0,7 million bottles respectively, increasing in both cases. Other markets farther and more relevant are, in the American continent, Mexico (0,78 M bot.), Canada (0,71 M bot.) and United States (0,46 M bot.), who has suffered market losses of 50%. In the Asian continent, China experiences a descent of 7,4% (1,2 M bot) and Japan increases slightly (4,6%) its value to 955.000 bottles. Overall, the DO Catalunya wines have reached 111 countries around the world, confirming its drive to export.

These numbers show that DO Catalunya is strongly consolidated as a great market option for Catalan wine growers and wineries, to which I would like to express my most sincere gratitude to the sector for trusting us.



CONSELL  
REGULADOR  
DENOMINACIÓ  
D'ORIGEN  
CATALUNYA

**Xavier Pié i Dols**  
President of the CRDO CATALUNYA  
May 2018

## 2. REGISTER'S SITUATION (on 31/12/17)

**REGISTER OF WINEGROWERS: 5.459 winegrowers**

**REGISTER OF VINEYARDS (RVC): 42.431 ha**

### REGISTER OF WINERIES:

<b>PRODUCTION section</b>	
Number of registered cellars:	<b>160</b>

<b>STORAGE section</b>	
Number of registered cellars:	<b>8</b>

<b>CRIANZA section</b>	
Number of registered cellars:	<b>102</b>

<b>BOTTLING section</b>	
Number of registered cellars:	<b>118</b>

<b>Número TOTAL de cellers inscrits:</b>	<b>200</b>
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### 3. RATING OF WINES

#### 3.1. VOLUME OF RATED WINE THROUGHOUT 2017

Type of wine	Total (sev. harvests)	Harvest 2016	
WHITE	24.819.051 L	14.684.452 L	59,17 %
ROSÉ	4.695.359 L	2.575.063 L	54,84 %
RED	20.951.779 L	14.438.633 L	68,91 %
<b>TOTAL</b>	<b>50.466.189 L</b>	<b>31.698.148 L</b>	<b>62,81%</b>

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

Type of wine	Volume
WHITE	3.300 L
ROSÉ	0 L
RED	308.670 L
<b>TOTAL</b>	<b>311.970 L</b>

#### 3.3. HARVEST RATING

HARVEST 2017	<b>VERY GOOD</b>
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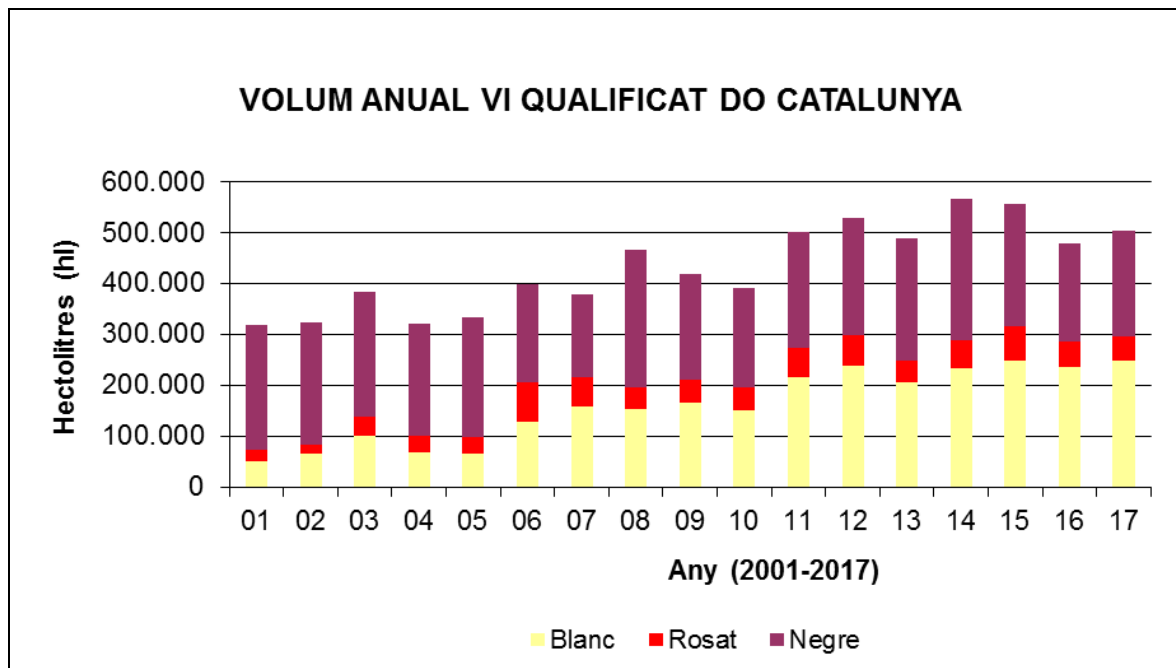
#### 3.4. EVOLUTION OF THE STOCKS OF THE RATED WINES (L)

Type Wine	END OF WINE YEAR			END OF NATURAL YEAR		
	31/07/16	31/07/17	Variety	31/12/16	31/12/17	Variety
White	5.082.705	6.130.734	20,62%	8.473.225	6.029.825	-28,84%
Rosé	1.205.621	1.189.676	-1,32%	2.120.251	2.009.740	-5,21%
Red	17.241.064	16.633.597	-3,52%	12.399.607	9.689.325	-21,86%
<b>TOTAL</b>	<b>23.529.390</b>	<b>23.954.008</b>	<b>1,80%</b>	<b>22.993.083</b>	<b>17.728.890</b>	<b>-22,89%</b>

Data in liters

### 3.5. ANNUAL EVOLUTION OF THE RATED WINES

YEAR	WHITE wine		ROSE wine		RED wine		TOTAL
	HI	%	HI	%	HI	%	HI
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
2016	236.159,94	49,31	50.530,52	10,55	192.216,17	40,14	478.897,63
<b>2017</b>	<b>248.190,51</b>	<b>49,18</b>	<b>46.953,59</b>	<b>9,30</b>	<b>209.517,79</b>	<b>41,52</b>	<b>504.661,89</b>
<b>Average</b>	<b>209.950,15</b>		<b>51.551,41</b>		<b>229.316,46</b>		<b>490.818,02</b>
<b>%</b>	<b>42,78</b>		<b>10,50</b>		<b>46,72</b>		<b>100,00</b>



Comparison 2017 vs 2016	
White	5,09%
Rosé	-7,08%
Red	9,00%
Total	5,38%

## 4. BOTTLED WINES' MARKETING

### 4.1. 2017 DOMESTIC MARKET / INTERNATIONAL MARKET

Type of wine	Domestic market	International market	TOTAL
White	11.551.853 L	11.086.346 L	<b>22.638.199 L</b>
Rosé	2.883.069 L	1.367.895 L	<b>4.250.964 L</b>
Red	7.726.429 L	12.214.312 L	<b>19.940.741 L</b>
<b>TOTAL</b>	<b>22.161.351 L</b>	<b>24.668.553 L</b>	<b>46.829.904 L</b>
	<b>29.548.468 bot (+9,85%)</b>	<b>32.891.404 bot (-1,53%)</b>	<b>62.439.872 bot (+3,55%)</b>

bot= 0,75 L bottles. In brackets, fluctuation from 2016

## 4.2. 2017 INTERNATIONAL MARKETS BREAKDOWN

Country (UE)	White (L)	Rosé (L)	Red (L)	TOTAL		%
				L	Bot 0,75 L	17 vs 16
Germany	689.283	228.996	1.440.890	2.359.169	3.145.559	6,36
Austria	19.408	2.798	25.288	47.494	63.325	20,49
Belgium	128.498	37.730	375.606	541.834	722.445	21,02
Bulgaria	18.126	7.268	8.393	33.787	45.049	3,56
Croatia	90	14	1.188	1.292	1.723	127,87
Denmark	718.302	3.866	405.313	1.127.481	1.503.308	-8,73
Slovakia	10		4.726	4.736	6.315	100,42
Slovenia	135		68	203	271	-74,07
Estonia	88.052	16.970	105.422	210.444	280.592	-22,25
Finland	280.138	92.792	325.693	698.623	931.497	-1,53
France	444.841	20.571	246.460	711.872	949.163	56,23
Greece	36.891	3.780	4.617	45.288	60.384	-18,46
Hungary	1.464	0	1.193	2.657	3.543	59,01
Ireland	37.069	97	21.519	58.685	78.247	-87,57
Italy	17.290	2.278	43.142	62.710	83.613	-8,81
Latvia	111.421	14.900	102.127	228.448	304.597	69,33
Lithuania	566.789	37.847	438.819	1.043.455	1.391.273	41,17
Luxemburg	1.792	4.986	13.515	20.293	27.057	47,31
Malta	2.241	401	11.435	14.077	18.769	-11,34
Netherlands	593.593	54.611	1.131.064	1.779.268	2.372.357	-20,86
Poland	157.128	5.640	140.025	302.793	403.724	41,64
Portugal	6.930	1.508	13.856	22.294	29.725	36,73
United Kingdom	2.677.994	11.962	1.191.636	3.881.592	5.175.456	-10,44
Czech Republic	5.112	915	6.743	12.770	17.027	18,85
Romania	7.587	1.948	2.520	12.055	16.073	41,69
Sweden	299.068	29.225	786.983	1.115.276	1.487.035	-7,14
Cyprus	7.628	270	4.739	12.637	16.849	20,78
<b>Total UE</b>	<b>6.916.880</b>	<b>581.373</b>	<b>6.852.980</b>	<b>14.351.233</b>	<b>19.134.977</b>	<b>-4,05</b>



Country (EUROPE, NOT UE)				TOTAL		% 17 vs 16
	White (L)	Rosé (L)	Red (L)	L	Bot 0,75 L	
Albania	39.976	11.538	40.239	91.753	122.337	7,16
Andorra	45.851	17.659	67.849	131.359	175.145	-11,19
Byelorussia	6.751	0	7.313	14.064	18.752	-3,84
Bosnia Hercegovina	5	5	239	249	332	-75,83
Iceland	33.816	152	13.274	47.242	62.989	1,29
Macedonia	1.620	135	272	2.027	2.703	796,90
Monaco	0	0	20.308	20.308	27.077	1.178,04
Montenegro	0	0	0	0	0	-100,00
Norway	187.055	594	346.872	534.521	712.695	12,58
Russia	18.670	2.318	31.324	52.312	69.749	-20,18
Serbia	0	0	0	0	0	0 al 2016
Switzerland	105.707	8.804	644.676	759.187	1.012.249	43,81
Turkey	18.963	725	716	20.404	27.205	51,14
Ukraine	31.567	1.487	25.329	58.383	77.844	-14,77
<b>Total EUROPE NOT UE</b>	<b>489.981</b>	<b>43.417</b>	<b>1.198.411</b>	<b>1.731.809</b>	<b>2.309.079</b>	<b>19,57</b>

Country (AMERICA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 17 vs 16
				L	Bot 0,75 L	
Antigua and Barbuda	180		315	495	660	1.000,00
Netherlands Antilles	1.118	45	137	1.300	1.733	-77,11
Argentina	5	5		10	13	-88,89
Bahamas	1.179		1.386	2.565	3.420	61,93
Barbados	585		360	945	1.260	-78,51
Belize				0	0	-100,00
Bolivia				0	0	-100,00
Brazil	18.063	11.601	65.691	95.355	127.140	-37,53
Canada	288.717	25.545	218.697	532.959	710.612	-14,05
Colombia	7.362	1.458	15.303	24.123	32.164	-51,89
Costa Rica	8.014	189	41.760	49.963	66.617	-6,93
Cuba	106.791	6.126	130.762	243.679	324.905	22,20
El Salvador	1.908		12.915	14.823	19.764	-47,02
Ecuador				0	0	-100,00
United States	86.717	46.554	207.997	341.268	455.024	-49,86
Granada	113		270	383	511	-14,89
Guatemala	2.637	653	11.682	14.972	19.963	-27,51
Honduras	1.323	5	1.141	2.469	3.292	0 al 2016
Bermuda	135		675	810	1.080	139,64
Cayman Islands	12.087	252	9.657	21.996	29.328	88,43
Virgin Islands	756		882	1.638	2.184	-63,89
Jamaica	8.883	1.008	10.503	20.394	27.192	-30,76
Mexico	58.880	7.290	516.202	582.372	776.496	-1,87
Nicaragua	2.142		2.057	4.199	5.599	-21,79
Panama	3.416	450	5.868	9.734	12.979	-14,17
Paraguay	450		2.070	2.520	3.360	-44,35
Peru	1.575	500	14.193	16.268	21.691	-7,47
Dominican Republic	48.515	7.362	126.158	182.035	242.713	61,38
Saint Vincent and the Grenadines	90		180	270	360	-14,29
Saint Lucia	1.800			1.800	2.400	-78,21
Uruguay	999		7.002	8.001	10.668	169,30
Venezuela				0	0	-100,00
Chile	2	2	56.863	56.867	75.823	-27,72
<b>Total AMERICA</b>	<b>664.442</b>	<b>109.045</b>	<b>1.460.726</b>	<b>2.234.213</b>	<b>2.978.951</b>	<b>-17,64</b>

Country (ASIA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 17 vs 16
				L	Bot 0,75 L	
Saudi Arabia				0	0	-100,00
Armenia	315	68	198	581	775	14,15
Bahrain	3.870	1.260	5.535	10.665	14.220	26,74
Birmania (Myanmar)	810	630	4.968	6.408	8.544	-39,59
Cambodia	855	495	2.930	4.280	5.707	280,44
South Korea	8.289		67.644	75.933	101.244	12,52
United Arab Emirates	37.793	12.497	43.472	93.762	125.016	8,63
Philippines	4.286		17.112	21.398	28.531	-27,86
Georgia				0	0	0 al 2016
Hong Kong	19.476	1.562	123.377	144.415	192.553	123,44
India	13.082	2.700	27.562	43.344	57.792	3,27
Indonesia				0	0	-100,00
Iran	1.350	450	7.200	9.000	12.000	-4,76
Israel	5.392	1.971	4.258	11.621	15.495	-13,28
Japan	279.809	14.100	422.505	716.414	955.219	4,60
Jordanian				0	0	-100,00
Kazakhstan	9.383	1.080	5.918	16.381	21.841	-21,38
Laos	317	452	3.402	4.171	5.561	517,93
Lebanon	990		2.250	3.240	4.320	125,00
Malaysia	11.882	1.575	26.678	40.135	53.513	22,93
Mongolia				0	0	-100,00
Nepal				0	0	-100,00
Qatar	3.870	774	24.528	29.172	38.896	-16,78
Singapore	3.939	1.644	8.951	14.534	19.379	13,36
Sri Lanka	4.482	1.836	5.787	12.105	16.140	12,42
Taiwan	13.546	1.081	50.015	64.642	86.189	-3,65
Thailand	135		4.680	4.815	6.420	-55,19
Vietnam	720		1.035	1.755	2.340	-45,83
China	92.005	6.611	785.443	884.059	1.178.745	-7,35
<b>Total ASIA</b>	<b>516.596</b>	<b>50.786</b>	<b>1.645.448</b>	<b>2.212.830</b>	<b>2.950.440</b>	<b>1,45</b>

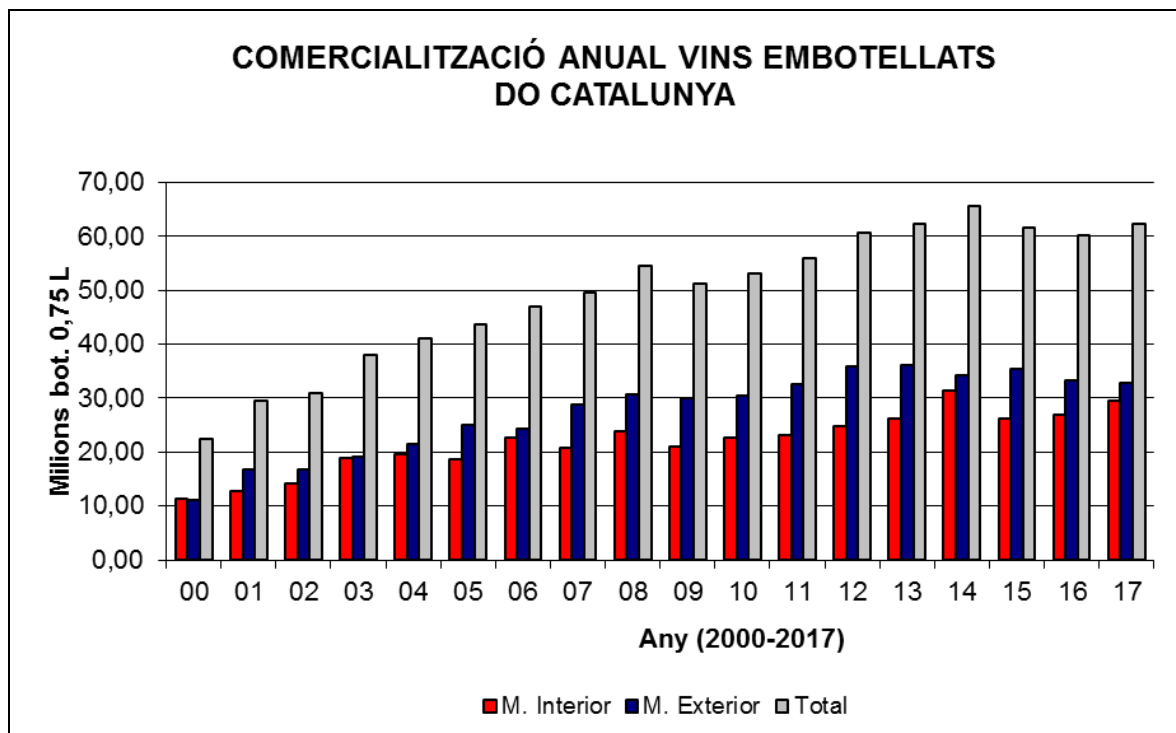
Country (OCEANIA)	White (L)	Rosé (L)	Red (L)	TOTAL		% 17 vs 16
				L	Bot 0,75 L	
Australia	3.915	7.722	19.773	31.410	41.880	-5,83
Fiji	1	1	1	3	4	-99,89
Nova Zealand	1.013	4.287	5.880	11.180	14.907	130,80
<b>Total OCEANIA</b>	<b>4.929</b>	<b>12.010</b>	<b>25.654</b>	<b>42.593</b>	<b>56.791</b>	<b>4,34</b>

Country (AFRICA)	White (L)	Rosé (L)	RED (L)	TOTAL		% 17 vs 16
				L	Bot 0,75 L	
Algeria			99	99	132	-85,33
Cameroon			275	275	367	-89,08
Cape Verde	504			504	672	-83,82
Congo	135		45	180	240	0 al 2016
Ivory Coast	248		1.440	1.688	2.251	0 al 2016
Egypt	923	585	374	1.882	2.509	2.038,64
Ethiopia	810		6.426	7.236	9.648	0 al 2016
Gabon				0	0	-100,00
Ghana				0	0	-100,00
Guinea Equatorial	2.368	149	590	3.107	4.143	-26,22
Kenia	1.279		1.782	3.061	4.081	93,12
Morocco	3.776	770	4.734	9.280	12.373	-0,08
Mauricio		711	2.358	3.069	4.092	-65,87
Nigeria	2.138	756	5.243	8.137	10.849	-86,91
Seychelles	450	405	720	1.575	2.100	-51,39
Sud-Africa	2		16.455	16.457	21.943	3.501,09
Swaziland			1.125	1.125	1.500	0 al 2016
Tanzania	1.638		1.134	2.772	3.696	-49,96
Togo	2.250	1.350	9.000	12.600	16.800	154,55
Uganda				0	0	-100,00
<b>Total AFRICA</b>	<b>16.521</b>	<b>4.726</b>	<b>51.800</b>	<b>73.047</b>	<b>97.396</b>	<b>-31,86</b>
Dept. of France	675.003	14.513	139.167	<b>828.577</b>	1.104.769	-23,07
Canary Islands, Ceuta and Melilla	1.801.861	552.039	840.245	<b>3.194.145</b>	4.258.860	26,45
<b>TOTAL INTERNATIONAL M.</b>	<b>11.086.213</b>	<b>1.367.909</b>	<b>12.214.431</b>	<b>24.668.553</b>	<b>32.891.404</b>	<b>-1,53</b>

### 4.3. EVOLUTION OF THE BOTTLED WINES' MARKETING

Year	Domestic M.	International M.	Total
2000	11,35	11,10	<b>22,45</b>
2001	12,77	16,70	<b>29,47</b>
2002	14,09	16,80	<b>30,89</b>
2003	18,82	19,18	<b>38,00</b>
2004	19,64	21,44	<b>41,08</b>
2005	18,73	24,99	<b>43,72</b>
2006	22,73	24,36	<b>47,09</b>
2007	20,73	28,89	<b>49,62</b>
2008	23,74	30,79	<b>54,53</b>
2009	21,14	30,03	<b>50,50</b>
2010	22,71	30,48	<b>53,19</b>
2011	23,20	32,68	<b>55,88</b>
2012	24,80	35,89	<b>60,69</b>
2013	26,24	36,15	<b>62,43</b>
2014	31,42	34,22	<b>65,64</b>
2015	26,13	35,40	<b>61,53</b>
2016	26,90	33,40	<b>60,30</b>
2017	29,55	32,89	<b>62,44</b>

Data in 0,75 L million bottles



Comparison 2017 vs 2016	
Domestic M.	+9,85%
International M.	-1,53%
<b>TOTAL</b>	<b>+3,55%</b>

## 5. SUITABLE GRAPES DO CATALUNYA. 2017 HARVEST

Extracted weighted grapes RVC (November 2017)

<b>WHITE GRAPES 2017</b>	<b>Kg</b>	<b>%</b>	<b>% vs 2016</b>
Albarino	26.996	0,06	-46,09
Chardonnay	2.309.283	5,19	0,34
Chenin	281.266	0,63	2,17
Grenache blanc, white Grenache	4.797.519	10,79	-8,74
Gewürztraminer	259.924	0,58	34,77
Maccabeo	4.393.393	9,88	-26,28
Malvasia from Sitges, Malvasia grossa, Malvasia aromatic	20.149	0,05	12,85
Muscat of Alexandria	4.703.813	10,58	5,16
Muscat de Frontignan	306.734	0,69	-18,20
Parellada	3.940.411	8,86	16,89
Pedro Ximenez	5.520	0,01	-35,48
Picapoll blanc	3.584	0,01	-6,86
Riesling	87.114	0,20	-47,37
Sauvignon blanc	601.714	1,35	-33,74
White sumoll	20.977	0,05	12,74
Vinyater	1.400	0,00	0,00
Viognier	25.191	0,06	-40,79
Xarello	855.656	1,92	22,96
<b>Total white grapes</b>	<b>22.640.644</b>	<b>50,91</b>	<b>-6,12</b>
<b>RED GRAPES 2017</b>	<b>Kg</b>	<b>%</b>	<b>% vs 2016</b>
Cabernet franc	107.041	0,24	-17,36
Cabernet sauvignon	3.146.252	7,07	-33,25
Cariñena	1.331.657	2,99	-1,47
Grenache	5.115.833	11,50	-13,42
Grenache Peluda	8.810	0,02	-62,70
Red Grenache	1.200	0,003	
Grenache tintorera	202.578	0,46	-32,53
Merlot	4.283.376	9,63	-30,77
Monastrell, Mourvedre	46.462	0,10	-3,50
Petit Verdot	11.560	0,03	244,05
Pinot Noir	223.175	0,50	-19,67
Sumoll	70.220	0,16	-53,51
Syrah	2.896.597	6,51	-23,69
Trepat	1.880	0,00	-88,84
Tempranillo	4.387.040	9,86	-31,49
<b>Total red grapes</b>	<b>21.833.681</b>	<b>49,09</b>	<b>-25,51</b>
<b>TOTAL</b>	<b>44.474.325</b>	<b>100</b>	<b>-16,76</b>

## **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.