

## ANNUAL RESULTS REPORT 2008

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### REGULATING COUNCIL DESIGNATION OF ORIGIN CATALUNYA

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## CONTENTS

	<u>Pag.</u>
1. INTRODUCTION .....	2
2. REGISTERS OF THE DESIGNATION OF ORIGIN .....	3
3. GRADING OF WINES .....	4
4. MARKETING OF BOTTLED WINE .....	6
5. WINE CELLARS/WINERIES REGISTERED UNDER DESIGNATION OF ORIGIN CATALUNYA .....	11

## 1. INTRODUCTION

Like every year, the Regulator Council compiles the CATALUNYA Designation of Origin's Annual Report, in this case, corresponding to the 2008 financial year.

The total volume of qualified wines has been 466.600 hl., 23.1% higher than in 2007. We must emphasize the big increase of red wines (65.5%). White wines have decreased slightly compared to 2007 (-3.2%) and the rosés keep on falling down (-25.4%).

Proportionally, red wines are still the most important, but with a range overall (58%) followed by white wines representing the third part and finally the rosés, with less than 10%.

Of all qualified wines, 321.686 hl. (68.9%) are from the 2007 vintage wine, and the rest belong to other seasons.

As for bottled wine, it reaches an amount of 54.4 million  $\frac{3}{4}$  l. bottles, 23.7 (43.5%) with concern to the local market and the rest, 30.8 million (56.5%) belong to the foreign markets. If we compare this numbers to 2007, the fact is that both markets have grown (14.5% and 6.6% respectively). The final increase of the total commercialization compared to 2007 has been 4.9 million bottles (+9.9%).

The main foreign markets belong to the European Union, with a total amount of 17.9 million bottles (58.1% of the exports). Inside this percentage and in order of significance, United Kingdom, Germany, Holland and Sweden are still the main markets, followed by Switzerland and Norway (out of the European Union) with nearly one million of bottles.

Other markets, more distant than the latest ones but still important have been United States, with more than 2.3 million bottles, Japan with nearly a million bottles, and Canada and Mexico with more than 650 000 bottles. In fact, the wines of the CATALUNYA Designation of Origin have reached 114 different countries.

These continuous growth results of the CATALUNYA Designation of Origin come from the effort of lots of wineries and vine growers that work with us and to whom we would like to thank for their confidence.



CONSELL  
REGULADOR  
DENOMINACIÓ  
D'ORIGEN  
CATALUNYA

Xavier Pié i Dols  
President of CRDO CATALUNYA

March 2009

## 2. REGISTERS OF THE DESIGNATION OF ORIGIN (as on 31/12/2008)

**REGISTER OF WINE GROWERS: 9,874**

**REGISTER OF VINEYARDS (RVC): 54,233 ha**

**REGISTER OF WINE CELLARS/WINERIES:**

<b>PRODUCTION section</b>	
Number of wine cellars registered:	<b>186</b>
<b>STORAGE section</b>	
Number of wine cellars registered:	<b>33</b>
<b>AGEING section</b>	
Number of wine cellars registered:	<b>95</b>
<b>BOTTLING section</b>	
Number of wine cellars registered:	<b>116</b>
<b>TOTAL number of wine cellars registered:</b>	<b>212</b>

### 3. GRADING OF WINES

#### 3.1. VOLUME OF WINE GRADED THROUGHOUT 2008

Type of wine	Total (various vintages)	2007 Vintage	
WHITE	15,473,821 L	10,186,112 L	65.83 %
ROSÉ	4,183,073 L	3,234,114 L	77.31 %
RED	27,003,071 L	18,748,357 L	69.43 %
<b>TOTAL</b>	<b>46,659,965 L</b>	<b>32,168,583 L</b>	<b>68.94 %</b>

#### 3.2. VOLUME OF WINE NOT GIVEN A GRADE THROUGHOUT 2008 (for failing to reach the control standards)

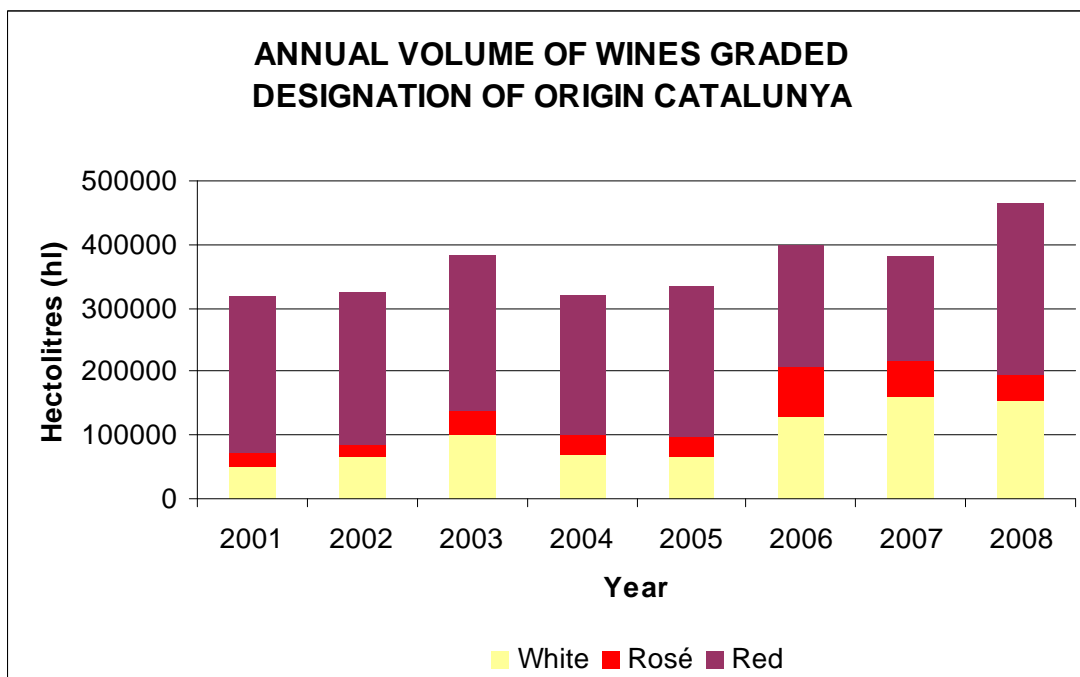
Type of wine	Volume
WHITE	32,590 L
ROSÉ	90 L
RED	53,707 L
<b>TOTAL</b>	<b>86,387 L</b>

#### 3.3. VINTAGE RATING

VINTAGE 2008	<b>VERY GOOD (provisionally)</b>
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**3.4. PROGRESS OF WINE GRADING**

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	77.30	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
<b>2008</b>	<b>154,738.21</b>	<b>33.16</b>	<b>41,830.73</b>	<b>8.97</b>	<b>270,030.71</b>	<b>57.87</b>	<b>466,599.65</b>
<b>Average</b>	<b>99,579.88</b>		<b>39,529.02</b>		<b>226,899.96</b>		<b>366,008.87</b>
<b>%</b>	<b>27.21</b>		<b>10.80</b>		<b>61.99</b>		<b>100.00</b>



<b>Comparative 2008 vs 2007</b>	
Blanc	-3.2%
Rosat	-25.4%
Negre	+65.5%
<b>TOTAL</b>	<b>+23.1%</b>

## 4. MARKETING OF BOTTLED WINES

### 4.1. HOME MARKET / OVERSEAS MARKET 2008

Type of wine	Home Market	Overseas Market	TOTAL Marketed
White	6,961,263 L	8,042,010 L	15,003,273 L
Rosé	2,306,945 L	1,776,874 L	4,083,819 L
Red	8,534,143 L	13,277,794 L	21,811,937 L
<b>TOTAL</b>	<b>17,802,351 L</b>	<b>23,096,678 L</b>	<b>40,899,029 L</b>
	23,736,469 bot (+14.5%)	30,795,571 bot (+6.6%)	54,532,039 bot (+9.9%)

bot=0.75 L bottles. In brackets, variation versus 2007

### 4.2. BREAKDOWN OF OVERSEAS MARKETS 2008

Country	White (L)	Rosé (L)	Red (L)	TOTAL		% 08 vs 07
				L	Bot 0.75 L	
Austria	11,825	1,196	34,891	47,912	63,882	3.44
Belgium	193,701	31,181	496,444	721,326	961,767	11.69
Cyprus	2,340	113	2,700	5,153	6,870	-17.34
Czech Republic	10,534	11,566	41,613	63,713	84,950	237.71
Denmark	136,901	8,501	322,323	467,725	623,633	-40.41
Estonia	38,039	12,537	57,179	107,755	143,673	-21.30
Finland	218,486	3,368	405,155	627,009	836,012	30.03
France	58,313	27,404	291,287	377,003	502,671	-12.90
Germany	493,453	227,065	2,001,576	2,722,094	3,629,458	5.14
Greece	6,633	72	4,802	11,507	15,342	-8.48
Hungary	1,170	3,177	6,390	10,737	14,316	35.57
Ireland	450,436	14,495	529,397	994,328	1,325,770	49.29
Italy	28,026	769	56,507	85,302	113,736	-31.75
Latvia	17,201	9,000	70,280	96,480	128,640	121.38
Lithuania	166,412	24,416	179,202	370,030	493,373	34.44
Luxembourg	0	0	0	0	0	-100.00
Malta	6,616	2,295	32,380	41,291	55,054	8.18
Poland	39,312	9,473	96,079	144,864	193,151	9.63
Portugal	7,403	0	19,568	26,970	35,960	137.96
Slovakia	68	0	114,775	114,843	153,123	6,469.00
Slovenia	9	0	600	609	812	-62.46
Sweden	280,138	28,934	805,330	1,114,403	1,485,870	3.43
The Netherlands	555,048	619,806	929,844	2,104,698	2,806,264	22.58
United Kingdom	1,878,802	174,989	1,115,883	3,169,674	4,226,232	8.07
<b>Total UE</b>	<b>4,600,862</b>	<b>1,210,355</b>	<b>7,614,203</b>	<b>13,425,420</b>	<b>17,900,560</b>	<b>10.17</b>

Country	White (L)	Rosé (L)	Red (L)	TOTAL		% 08 vs 07
				L	Bot 0.75 L	
Albania	810	90	3,137	4,037	5,383	57.39
Andorra	33,129	23,840	72,122	129,091	172,121	5.31
Belorussia	1,872	720	3,312	5,904	7,872	-82.08
Bosnia and Herzegovina	181	181	271	633	844	1.407.14
Bulgaria	7,370	2,358	2,633	12,361	16,481	8.57
Croatia	968	9	2,790	3,767	5,022	-10.49
Iceland	25,575	180	19,763	45,518	60,690	22.37
Macedonia	0	0	0	0	0	-100.00
Montenegro	495	0	495	990	1,320	524.11
Norway	202,531	11,045	484,369	697,945	930,593	13.37
Romania	3,372	90	11,939	15,401	20,534	-36.51
Russia	1,134	189	25,765	27,088	36,117	-94.31
Serbia	0	0	0	0	0	-100.00
Switzerland	34,641	18,577	667,553	720,770	961,026	-12.67
Turkey	2,927	0	6,525	9,452	12,602	0 al 2007
Ukraine	12,843	378	9,801	23,022	30,696	0 al 2007
Vatican City	0	0	0	0	0	-100.00
<b>Total EUROPE NON- UE</b>	<b>327,846</b>	<b>57,656</b>	<b>1,310,474</b>	<b>1,695,976</b>	<b>2,261,301</b>	<b>-21.26</b>
Anguilla	0	0	0	0	0	-100.00
Antigua and Barbuda	306	0	495	801	1,068	18.67
Aruba	1,778	432	2,579	4,788	6,384	280.00
Bahamas	722	0	1,260	1,982	2,642	6.28
Barbados	990	2	990	1,982	2,642	43.90
Belize	1,260	126	756	2,142	2,856	142.86
Bermuda	0	0	540	540	720	20.00
Bolivia	117	27	2,367	2,511	3,348	-34.20
Brazil	8,532	720	42,318	51,570	68,760	58.83
Caiman Islands	379	1	506	885	1,180	0 al 2007
Canada	111,312	3,361	401,819	516,492	688,656	44.63
Colombia	1,351	1	10,306	11,657	15,543	23.36
Costa Rica	3,420	594	21,089	25,103	33,470	54.74
Cuba	128,498	12,933	204,290	345,720	460,960	32.54
Ecuador	270	0	4,212	4,482	5,976	-57.65
El Salvador	1,575	90	24,737	26,402	35,202	0.29
Granada	135	0	180	315	420	-53.33
Guatemala	2,214	0	21,326	23,540	31,386	18.32
Honduras	900	90	1,800	2,790	3,720	-63.95
Jamaica	2,271	0	1,769	4,040	5,386	-72.46
Mexico	56,565	0	443,271	499,836	666,448	-20.14
Netherlands Antilles	675	90	1,710	2,475	3,300	-0.92
Nicaragua	455	0	495	950	1,266	-78.26
Turks Islands	129	2	131	261	348	0 al 2007
United States	618,750	35,237	1,096,039	1,750,025	2,333,366	5.03
Virgin Isles	1,755	1,188	5,346	8,289	11,052	73.12

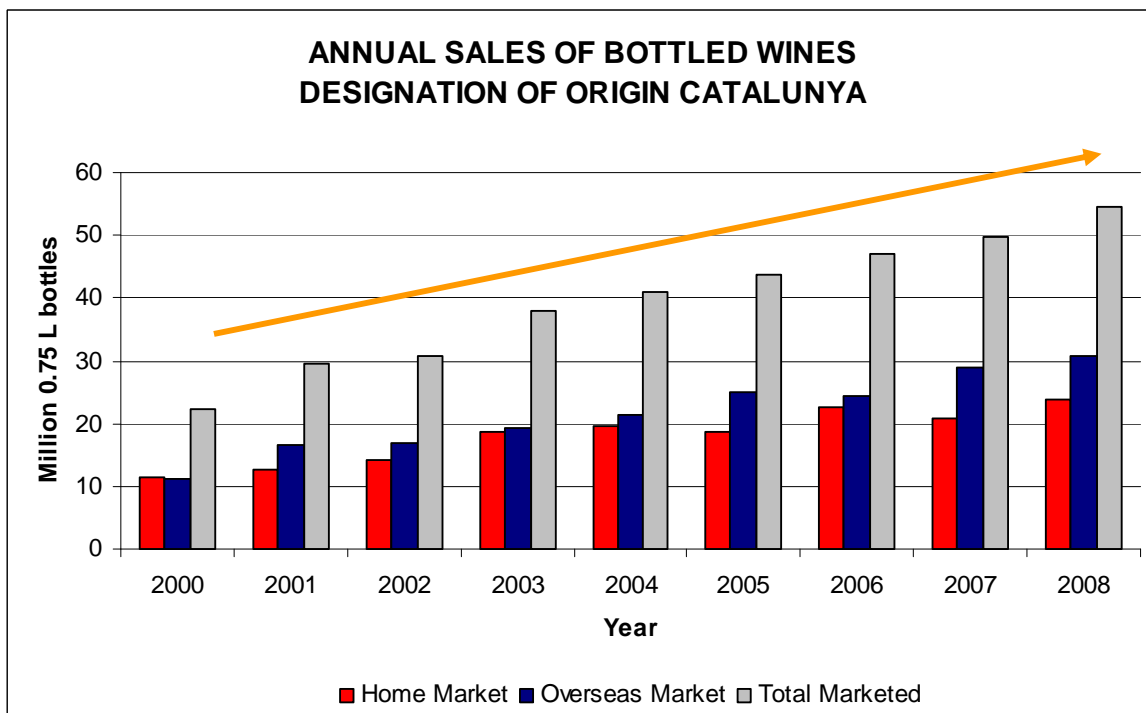
Country	White (L)	Rosé (L)	Red (L)	TOTAL		% 08 vs 07
				L	Bot 0.75 L	
Chile	1	0	9,774	9,775	13,033	-68.32
Dominican Republic	34,232	5,459	76,037	115,727	154,302	16.37
Panama	57,425	5,436	89,465	152,325	203,100	-53.29
Peru	981	0	11,691	12,672	16,896	-40.95
Puerto Rico	2,520	0	0	2,520	3,360	-20.90
St. Lucia	3,412	1,350	3,618	8,380	11,173	390.04
St. Martin	8,190	630	10,584	19,404	25,872	77.01
St. Vincent and the Grenadines	0	0	0	0	0	-100.00
Suriname	0	0	270	270	360	-78.57
Tortola	3,240	0	1,008	4,248	5,664	-8.53
Trinidad and Tobago	0	0	0	0	0	-100.00
Uruguay	8,460	0	10,071	18,531	24,708	316.80
Venezuela	6,300	5	7,596	13,901	18,534	23.89
<b>Total AMERICA</b>	<b>1,069,116</b>	<b>67,771</b>	<b>2,510,440</b>	<b>3,647,326</b>	<b>4,863,101</b>	<b>1.58</b>
Armenia	270	270	270	810	1,080	-80.43
Bahrain	810	360	1,260	2,430	3,240	-19.16
Bangladesh	180	0	900	1,080	1,440	20.00
Bhutan	0	0	0	0	0	-100.00
Cambodia	1,665	405	2,655	4,725	6,300	118.75
China	27,194	875	150,024	178,093	237,457	32.07
Georgia	0	0	0	0	0	-100.00
Hong Kong	9,483	2,481	61,191	73,154	97,539	193.48
India	10,014	315	12,504	22,833	30,444	0.95
Israel	4,097	900	7,967	12,965	17,286	-1.67
Japan	203,416	14,024	528,681	746,120	994,827	36.25
Jordan	0	0	585	585	780	38.30
Kazakhstan	3,420	0	4,005	7,425	9,900	30.33
Laos	90	0	0	90	120	-97.47
Lebanon	0	0	270	270	360	-74.58
Macao	0	0	0	0	0	-100.00
Malaysia	8,687	2,700	15,842	27,228	36,304	93.69
Philippines	2,835	270	12,830	15,935	21,246	-27.77
Qatar	4,500	855	6,480	11,835	15,780	115.57
Singapore	8,404	181	16,661	25,246	33,662	14.72
South Korea	9,614	6,077	28,998	44,690	59,586	-54.81
Sri Lanka	767	0	2,475	3,242	4,322	221.58
Syria	1,013	450	2,723	4,185	5,580	0 al 2007
Taiwan	3,960	0	51,174	55,134	73,512	24.29
Thailand	1,791	2,700	7,668	12,159	16,212	40.70
United Arab Emirates	5,063	4,230	12,023	21,316	28,421	-82.47
Vietnam	2,313	0	7,065	9,378	12,504	41.67
<b>Total ASIA</b>	<b>309,584</b>	<b>37,092</b>	<b>934,249</b>	<b>1,280,925</b>	<b>1,707,900</b>	<b>14.69</b>

Country	White (L)	Rosé (L)	Red (L)	TOTAL		% 08 vs 07
				L	Bot 0.75 L	
Australia	10,818	6,750	26,478	44,046	58,728	-11.02
Guam	0	0	270	270	360	-86.67
Kiribati	0	0	0	0	0	-100.00
New Zealand	1,260	0	4,446	5,706	7,608	60.10
French Polynesia	135	0	90	225	300	150.00
<b>Total OCEANIA</b>	<b>12,213</b>	<b>6,750</b>	<b>31,284</b>	<b>50,247</b>	<b>66,996</b>	<b>-8.96</b>
Algeria	54	0	0	54	72	0 al 2007
Cape Verde	0	0	0	0	0	-100.00
Central African Republic	0	0	0	0	0	-100.00
Equatorial Guinea	252	0	504	756	1,008	-60.38
Ethiopia	158	0	315	473	630	-83.85
Gambia	0	0	0	0	0	-100.00
Ghana	1,296	81	4,392	5,769	7,692	142.29
Kenya	900	0	630	1,530	2,040	101,900
Libya	0	0	0	0	0	-100.00
Mauritius	1,296	675	2,700	4,671	6,228	38.40
Morocco	4,142	720	4,035	8,897	11,862	32.68
Niger	1,800	0	4,347	6,147	8,196	0 al 2007
Rwanda	0	0	0	0	0	-100.00
Seychelles	0	1,350	2,700	4,050	5,400	800.00
South Africa	0	0	333	333	444	-7.50
Tanzania	2,016	0	1,386	3,402	4,536	-74.72
Uganda	504	0	756	1,260	1,680	-45.10
<b>Total AFRICA</b>	<b>12,417</b>	<b>2,826</b>	<b>22,098</b>	<b>37,341</b>	<b>49,788</b>	<b>7.41</b>
Duty Free Deposits	40,982	18,045	28,864	<b>87,891</b>	<b>117,188</b>	3.62
Canary Islands, Ceuta and Melilla	1,668,990	376,380	826,182	<b>2,871,552</b>	<b>3,828,736</b>	17.46
<b>TOTAL OVERSEAS MARKET</b>	<b>8,042,010</b>	<b>1,776,874</b>	<b>13,277,794</b>	<b>23,096,678</b>	<b>30,795,571</b>	6.60

### 4.3. GROWTH OF SALES OF BOTTLED WINES

Year	Home Market	Overseas Market	Total Marketed
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>

Data in million of 0.75 L bottles



<b>Comparative 2008 vs 2007</b>	
Home Market	+14.5%
Overseas Market	+6.6%
TOTAL Marketed	+9.9%

## **5. WINE CELLARS/WINERIES REGISTERED UNDER THE DESIGNATION OF ORIGIN CATALUNYA**

Attached is a list of all the companies entered in the Register of Wine Cellars/Wineries D.O. CATALUNYA, together with the code for the section in which they appear.