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DO CAVA Av. Tarragona, 24 08720 Vilafranca del Penedès comunica@crcava.es www.docava.es fcrcava ¥@DO\_Cava

### 1. OVERALL ANALYSIS OF CAVA 2016

Cava has shown itself to be a very strong sector during the complicated economic situation of the last decade, maintaining both jobs and purchases in terms of kilos of grapes. Thanks to the hard work of companies and their strategic commitment to positioning Premium products in international markets, Cava has established itself, in export terms, as the 1st Spanish Designation of Origin (DO) and the 1st DO in the world using the traditional method.





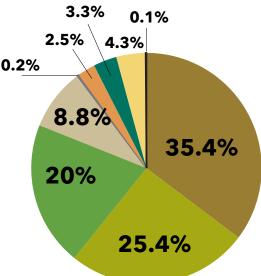
### 2. REGISTRATIONS

#### 2.1 Winegrowing operations



#### 2.2 Area registered by variety

2.5%	
0.2%	
.39 Has	MACABEO
.99 Has	XAREL·LO
20 Has	PARELLADA
.07 Has	CHARDONNAY
.61 Has 209	SUBIRAT PARENT
.43 Has	PINOT NOIR
.72 Has	TREPAT
.03 Has	GARNACHA TINTA
.57 Has	MONASTRELL



## 2. REGISTRATIONS

### 2.3 Base wine producers

YEAR	COMPANY
2010	164
2011	165
2012	163
2013	162
2014	159
2015	158
2016	162



### 2.4 Cava producers

YEAR	COMPANY
1980	82
1990	235
2000	269
2010	256
2011	254
2012	253
2013	247
2014	244
2015	241
2016	235



### **3. SHIPMENTS**



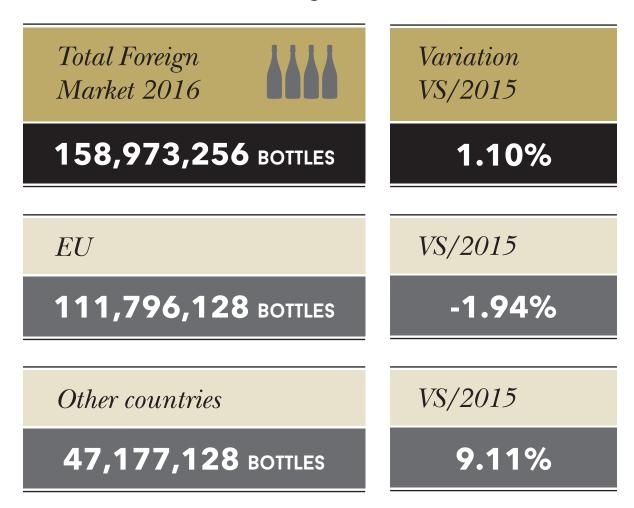
#### 3.1 History of the trend in Cava shipments

YEAR	TOTAL	DOMESTIC MARKET	FOREIGN MARKET
1900	200		
1910	400		
1920	1,000		
1930	2,400		
1940	2,400		
1950	5,700		
1960	10,500		
1970	47,000		
1980	82,048	72,000	10,048
1990	139,726	92,500	47,226
2000	196,751	<i>99</i> ,7 <i>3</i> 2	97,019
2010	244,801	95,641	149,160
2015	244,123	86,876	157,247
2016	245,156	86,183	158,973

\* in thousands of bottles

### 4. CAVA IN THE WORLD

#### 4.1 Foreign Market

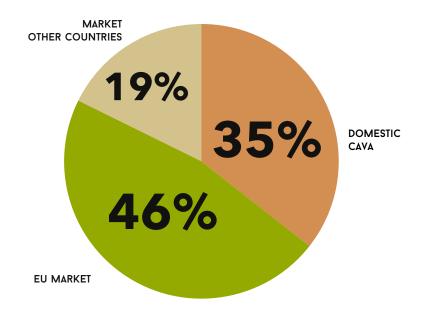


#### 4.2 Domestic Market



## 4. CAVA IN THE WORLD

#### 4.3 Cava sales in 2016



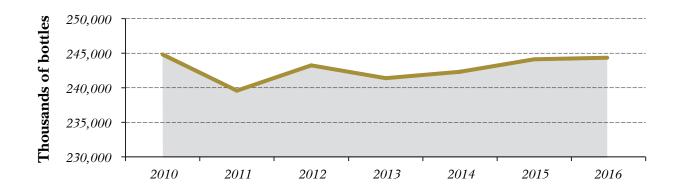


## 4. CAVA IN THE WORLD

YEAR	TOTAL	%	DOMESTIC MARKET	%	EU MARKET	%	MARKET OTHER COUNTRIES	%
2008	228,050	<i>1.38</i>	89,130	-9.21	106,540	12.15	32,380	1.88
2009	219,463	<i>-3</i> .77	88,253	-0.98	99,041	-7.04	32,383	0.01
2010	244,801	11.55	95,641	8.37	110,649	11.72	38,511	18.92
2011	239,555	-2.14	87,309	-8.71	113,219	2.32	<i>39</i> ,027	1.34
2012	243,232	1.53	81,825	-6.28	119,666	5.69	41,741	6.95
2013	241,365	-0.77	81,438	-0.47	117,836	-1.53	42,091	0.84
2014	242,288	0.38	87,580	7.54	111,620	-5.3	<i>43,088</i>	2.36
2015	244,123	0.76	86,876	-0.80	114,000	2.15	43,236	0.33
2016	245,156	0.42	86,183	-0.80	111,796	-1.94	47,177	9.11
VS/ TO- TAL				35.15		45.6		19.25

### 4.4 Trend in shipments

\* in thousand of bottles





## 5. FOREIGN MARKET

5.1	<b>Statistics</b>	1980-2016
-----	-------------------	-----------

YEAR	75 CL BOTTLES	% DIFF. PREV. YEAR
1980	10,048,230	
1985	28,852,069	
1990	47,226,159	
1995	60,729,132	
2000	97,018,660	
2010	149,160,023	13.68
2011	152,246,793	2.07
2012	161,406,721	6.02
2013	159,927,191	-0.92
2014	154,708,279	-3.26
2015	157,247,036	1.64
2016	158,973,256	1.10



## 5. FOREIGN MARKET

### 5.2 Ranking by country

COUNTRY	75 CL BOT.	% DIFF. 2015
BELGIUM	29,616,892	-1.74
GERMANY	28,416,935	-14.1
UNITED KINGDOM	26,821,915	-3.87
USA	21,304,164	7.65
FRANCE	8,972,133	20.75
JAPAN	8,505,084	8.67
NETHERLANDS	3,484,383	11.53
SWEDEN	3,439,599	14.04
FINLAND	3,139,525	8.69
SWITZERLAND	2,920,632	8.7
CANADA	2,447,900	2.87
DENMARK	1,914,487	21.75
NORWAY	1,616,335	8.9
ESTONIA	1,127,492	32.42
RUSSIA	1,121,443	91.69
AUSTRIA	1,101.423	39.51
BRAZIL	1,089,411	-2.16
ISRAEL	871,633	-1.23
POLAND	769,709	23.85
LITHUANIA	740,763	46.7
URUGUAY	739,372	147.12
AUSTRALIA	734,596	6.18
DOMINICAN REP,	584,588	36.86
CHINA	525,387	1.85
MEXICO	454,867	-5.96
LUXEMBOURG	398,945	8.07
PORTUGAL	379,637	-5.7
ITALY SOUTH KOREA	374,715	16.43
SOUTH KOREA SPAIN (FREE TRADE ZONES)	330,460 308,557	52.35 -29.89
LATVIA	295,515	49.99
PARAGUAY	284,811	274.9
ANDORRA	249,796	8.13
PERU	232,440	-1.79
IRELAND	228,067	41.44
UKRAINE	188,743	94.23

COUNTRY	75 CL BOT.	% DIFF. 2015
CZECH REP.	187,252	-21.3
PANAMA	183,668	-20.52
COLOMBIA	167,420	38.45
ARGENTINA	158,568	-59.31
SLOVENIA	136,477	-24.25
HONG KONG	132,825	-21.13
NEW ZEALAND	123,556	36
CHILE	112,619	0.56
CUBA	106,780	49.9
BELARUS	106,533	303.07
CROATIA	104,432	13.42
ICELAND	102,756	-5.88
SINGAPORE	85,457	27.73
NIGERIA	82,463	-37.97
TAIWAN	80,364	37.24
COSTA RICA	80,325	22.7
PUERTO RICO	69,289	22.92
NETHERLANDS ANTILLES	68,879	37.84
MOROCCO	63,855	60.89
GREECE	60,853	-0.27
VENEZUELA	59,285	-51.71
MALDIVES (Islands)	57,787	-4.9
ARAB EMIRATES	55,283	-5.35
GUATEMALA	53,503	42.33
HUNGARY	52,500	24.6
QATAR	50,357	-16.32
TURKEY	46,565	107.06
BULGARIA	42,697	96.52
SLOVAKIA	42,389	20.56
THAILAND	40,597	179.96
KOREA	40,084	-21.61
CYPRUS	31,512	59.4
BAHAMAS	26,069	-16.89
BOLIVIA	23,736	2.75
VIRGIN ISLANDS	21,908	-19.22
PHILIPPINES	21,117	19.5
SANTA LUCIA	19,200	39.13
REP. SOUTH AFRICA	19,068	119.31
GEORGIA	18,720	10.02
EL SALVADOR	18,709	19.02 78.52
JAMAICA ANCOLA	17,437	78.52
ANGOLA GHANA	14,460	25.97 29.44
ROMANIA	13,148	-57.3
INDONESIA	13,005 12,331	23.57
MARTINIQUE	í.	-44.13
UGANDA	11,444 10,788	-44.15
UGANDA	10,700	1)9.1

COUNTRY	75 CL BOT.	% DIFF. 2015
REUNIÓN	10,749	-41.08
TANZANIA	10,215	55.93
MALAYSIA	9,579	-39.98
SRI LANKA	9,557	113.72
GIBRALTAR	8,672	18.38
KENYA	8,667	298.77
CAYMAN ISLANDS	8,667	-17.27
VIETNAM	8,637	-57.79
IVORY COAST	8,400	42.05
GUADALUPE	8,251	
MALTA	7,820	-6.85
CAMBODIA	7,044	51.68
(Kampuchea)	7,011	91.00
EQUATORIAL GUINEA	6,848	-61.24
HONDURAS	6,744	34.95
SERBIA & MONTENEGRO	6,583	-49.56
ZIMBABWE	6,240	
ECUADOR	5,736	-68.28
BARBADOS	5,616	-67.32
ALGERIA	5,380	-52.81
HAITI	5,012	-34.85
KAZAKHSTAN	4,324	-65.88
TOGO	4,080	
LAOS	4,068	
NICARAGUA	3,633	180.35
MONGOLIA	2,935	36.96
REP. OF CABO		10.22
VERDE	2,892	12.33
LEBANON	2,879	139.89
CONGO	2,317	1000
BELIZE	2,068	-49.25
SURINAM	1,836	
TRINIDAD ど TOBAGO	1,260	-61.96
JORDAN	1,200	300
NEW CALEDONIA	852	18.33
BAHRAIN	840	-85.57
BURMA	792	88.57
BERMUDA	744	-75.97
SAN VICENTE	703	
INDIA	540	-95.4
GABON	180	
GAMBIA	151	-74.89
CAMEROON	121	
TOTAL	158,973,256	1.10





## 6. CAVA IN THE EUROPEAN UNION

COUNTRY	1986	2011	2012	2013	2014	2015	2016
Germany	2,161	40,365	39,461	40,289	30,546	<i>33</i> ,079	28,417
United Kingdom	1,225	31,956	35,926	29,904	28,833	27,902	26,822
Benelux	401	23,570	25,269	27,644	30,405	30,510	30,016
France	38	4,221	4,961	5,444	6,364	7,430	8,972
Netherlands	218	2,776	2,673	2,593	2,558	3,124	3,484
Finland	28	2,722	2,912	2,750	2,918	2,888	3,140
Sweden	1,000	2,225	2,443	2,592	2,789	3,016	3,440
Austria	90	1,354	1,533	1,482	1,203	789	1,101
Denmark	367	1,081	1,054	1,294	1,424	1,572	1,914
Poland		495	523	756	715	621	769
Portugal	218	490	484	469	480	402	380
Latvia		340	586	564	359	197	295
Ireland	42	322	231	183	116	161	228
Estonia		292	398	475	618	851	1,127
Italy	500	289	355	365	432	321	375
Lithuania		241	285	505	855	504	741
Czech Rep.		136	224	195	257	237	187
Hungary		100	52	38	53	42	52
Slovenia		92	140	157	159	180	137
Greece	5	61	45	52	88	61	61
Slovakia		41	43	32	41	35	42
Romania		25	26	31	89	30	13
Cyprus		21	31	29	22	19	32
Bulgaria		14	26	16	21	21	43
Malta		11	12	7	11	8	8
TOTAL	6,293	113,240	119,693	117,865	111,620	114,000	111,796
<b>DIFF.</b> (%±)			5.7	-1.53	-5.3	2.15	-1.94
% EU OUT OF TOTAL	16%	74%	74%	74%	72%	73%	70%

### 6.1 Trend by country

\* in thousands of 75 cl bottles

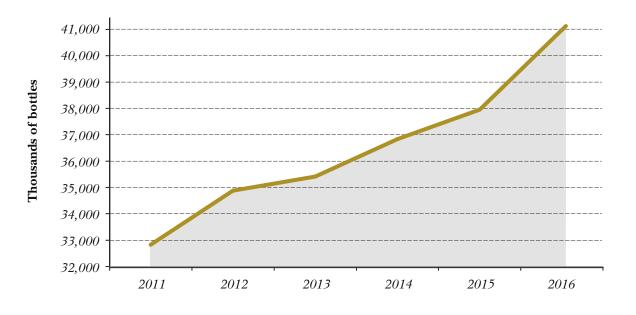


## 7. CAVA IN OTHER COUNTRIES

COUNTRY	2011	2012	2013	2014	2015	2016
United States	17,366	17,224	17,845	18,224	19,790	21,304
Japan	5,511	7,326	7,727	7,662	7,826	8,505
Switzerland	3,235	3,133	2,870	2,895	2,686	2,921
Canada	2,028	2,132	2,079	2,160	2,380	2,448
Norway	1,531	1,566	1,523	1,605	1,484	1,616
Russia	971	1,057	988	1285	1,113	1,121
Brazil	1,058	858	917	931	882	1,089
Israel	376	390	592	735	691	872
Australia	505	829	561	699	585	735
China	246	370	310	636	515	525
TOTAL	32,827	34,885	35,412	36,832	37,952	41,136

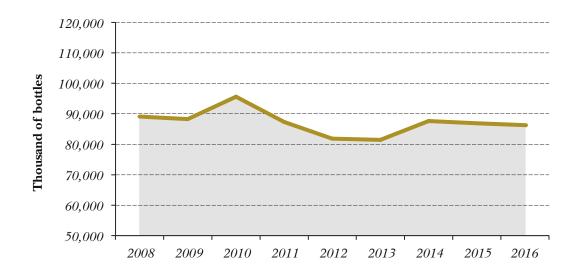
### 7.1 Trend by country

\* in thousands of 75 cl bottles





## 8. DOMESTIC MARKET

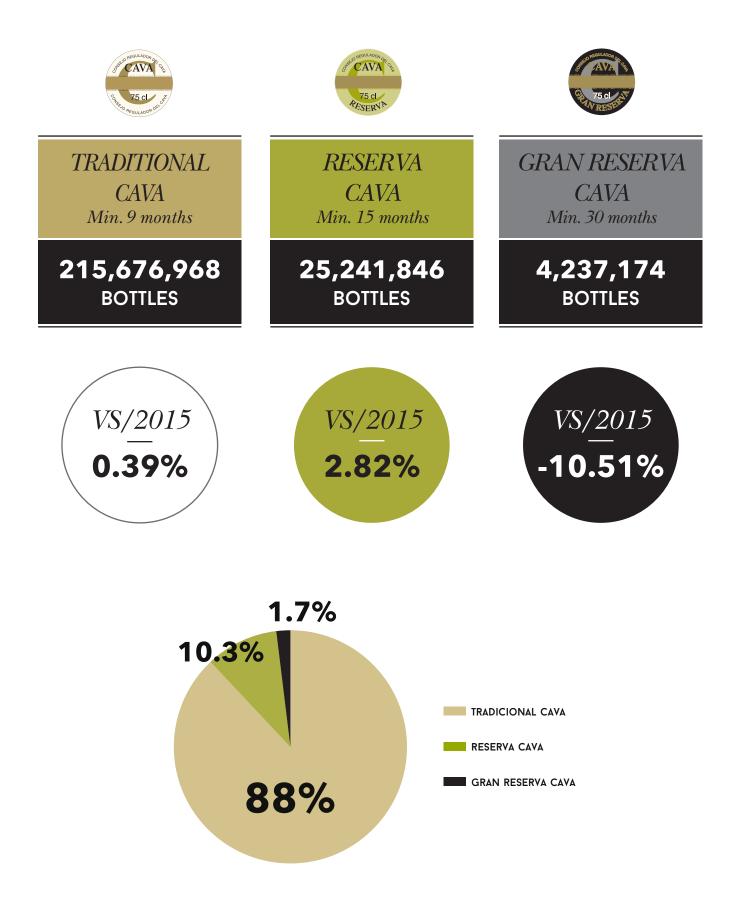


### 8.1 Trend in shipments in the Domestic Market

YEAR	DOMESTIC MARKET
2008	89,130
2009	88,253
2010	95,641
2011	87, <i>3</i> 09
2012	81,825
2013	81,438
2014	87,580
2015	86,876
2016	86,183

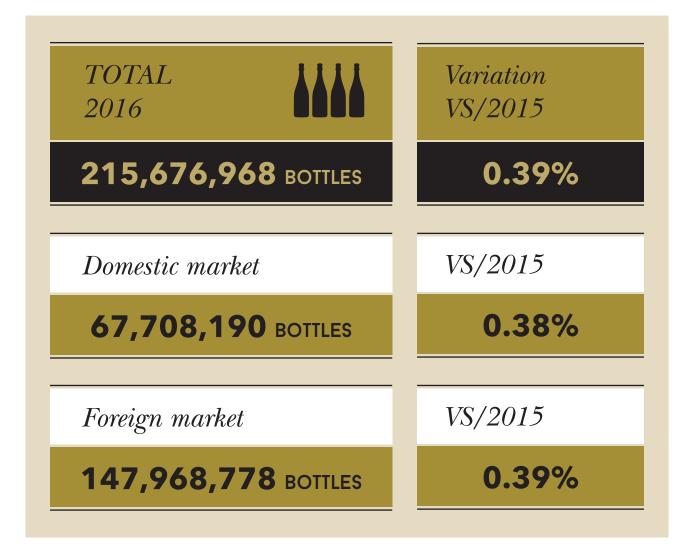


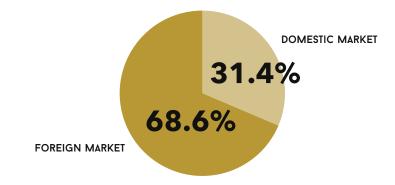




#### 9.1 Traditional Cava (Min. 9 months)

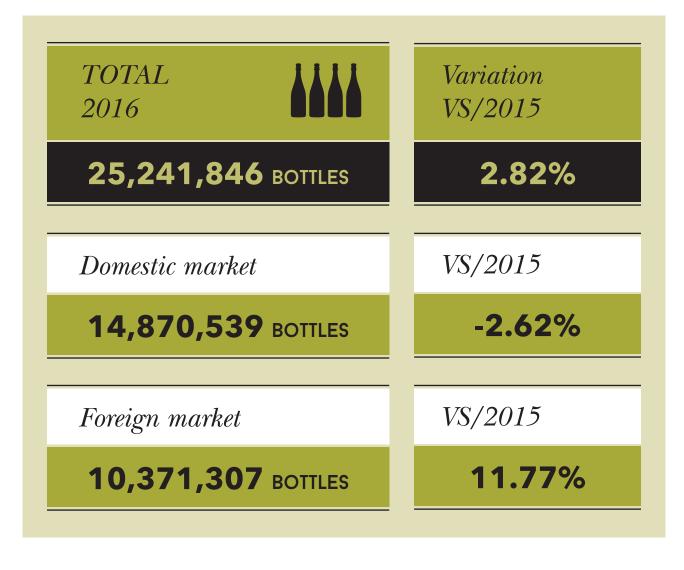


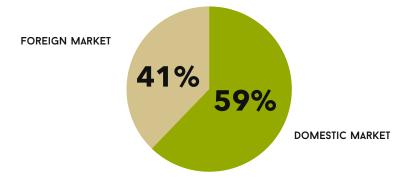




#### 9.2 Reserva Cava (Min. 15 months)

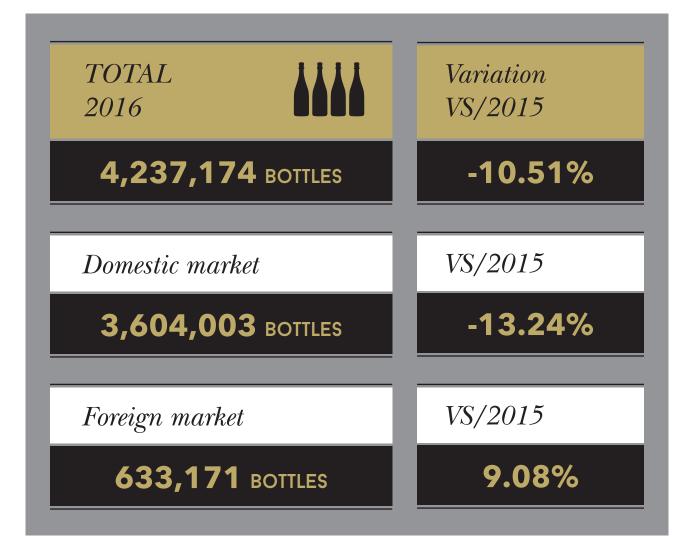


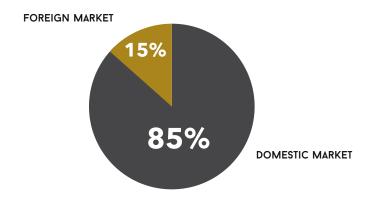




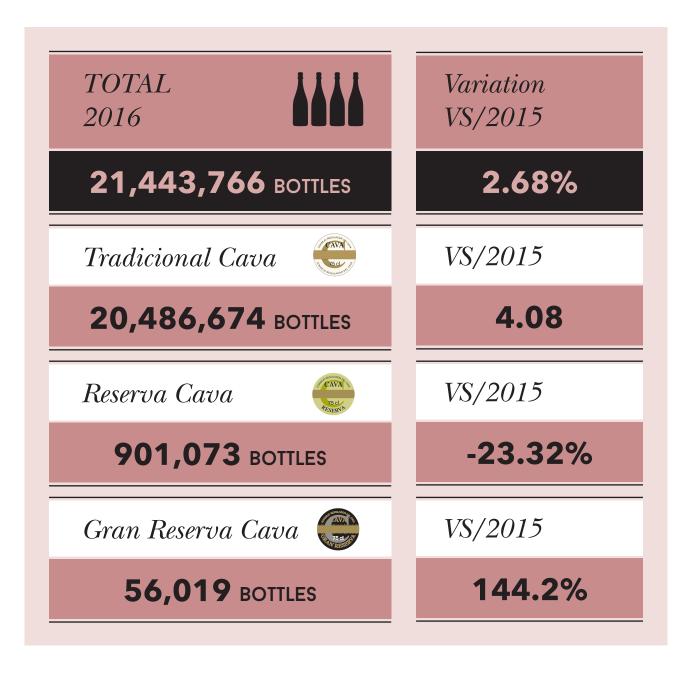
9.3 Gran Reserva Cava (Min. 30 months)

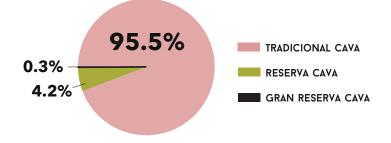






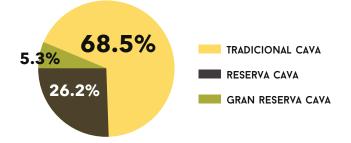
9.4 Rosé Cava





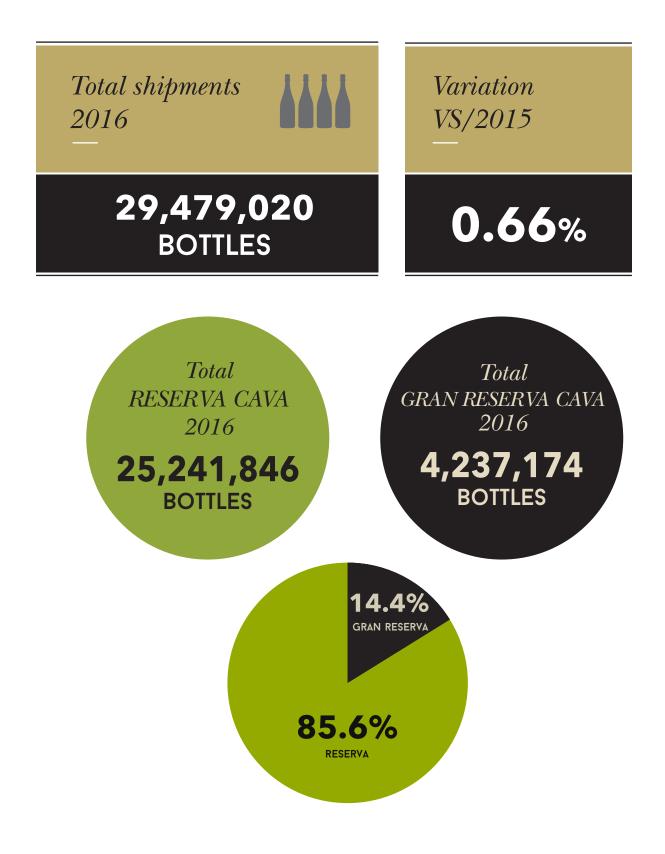
9.5 Organic Cava





### **10. PREMIUM CAVA IN THE WORLD**

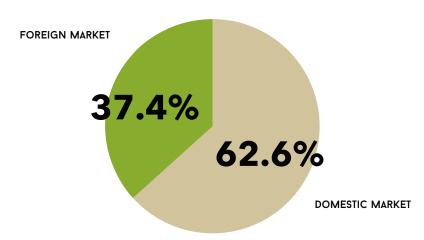
#### 10.1 Total shipments



### **10. PREMIUM CAVA IN THE WORLD**

#### 10.2 Premium Cava by market







## **10. PREMIUM CAVA IN THE WORLD**

### 10.3 Premium Cava ranking First 20 countries

COUNTRY	PREMIUM CAVA 2016	% DIFF. 2015	
Spain	18,474,542	-4.90%	
	2 1 4 4 1 7 2	15 40	
Belgium	3,144,173	15.42	
USA	1,287,272	4.97	
Japan	1,073,212	11.88	
Canada	748,921	4.57	
Germany	680,927	31.08	
United Kingdom	591,287	-18.26	
Sweden	543,132	33.49	
Netherlands	400,371	11.71	
Norway	341,587	30.78	
Denmark	321,661	40.55	
Finland	237,254	4.59	
Switzerland	145,881	8.66	
Dominican Rep.	129,972	28.03	
Peru	80,609	-26.44	
Australia	69,282	-28.86	
Mexico	65,830	34.43	
France	62,133	-25.72	
Poland	60,079	22.69	
South Korea	56,270	98.32	
Other countries	964,625	14.82	
TOTAL	11,004,478	<b>11.61</b> %	



Event to present the new "Single Estate Cava" classification at the Palau de la Música Catalana (Barcelona).

Attended by the international press from Germany, England, Belgium and the Netherlands.

Companies, winegrowers and other organisations from the industry were also present.

Presentation of the communication campaign: Corporate image, video and promotional brochure.

Round table with international experts: Pedro Ballesteros MW, Lenka Sedlackova MW, Yvonne Heistermann and Guillermo Cruz.

Press conference for general and specialist media.

Programme of activities for international participants (company visits, tastings).

Publicity campaign for Single Estate Cava in the main trade magazines:







#### ARTICLES ON CAVA

Publication of extensive articles on the DO of Cava, presenting the new Single Estate Cava classification in the main trade press, both nationally and internationally. Written by renowned prescribers.

DECANTER (UK) MEININGER (Germany) WEINREISEN (Germany) HORECA MAGAZINE (Belgium) L'ECCO (Belgium) MUNSKÄNKEN (Netherlands) VINUM (Netherlands) PLANETA VINO MI VINO-VINUM



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#### DECANTER CAVA ENCOUNTER

Event to promote premium Cava in the United Kingdom, organised in collaboration with the prestigious magazine Decanter.

Masterclass on Premium Cava given by Pedro Ballesteros MW.

Showroom for companies and tastings.

Brochure presenting the DOP Cava.

Publication of articles related to the event on Decanter.com.

Campaign via Decanter's social media Participants: Morning seminar for professionals and, in the afternoon, subscribers to the Decanter magazine.

Participation of 20 companies.

# Decanter



### Decanter

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+400

PEOPLE



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- Independent of the state

#### DRINK BUSINESS CAVA ROAD SHOW

Events to promote Premium Cava in different cities in the UK (Manchester, Exeter and Edinburgh), organised in collaboration with the prestigious Drink Business magazine.

Each event consisted of a Masterclass with a tasting of Premium Cava, given by a prestigious prescriber. The participants, subscribers of the Drink Business magazine, were prescribers, sommeliers, MW and educators.

Participation of 30 companies.

### drinks business



PREMIUM C. The Cava Masurclass Rosa

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+300 PEOPLE

#### CAVA EXPERIENCE

Events to promote Premium Cava for the trade press and prescribers in the gastronomy and wine sectors in the main European cities.

The aim was to present premium products and show their perfect harmony with the local cuisine.

Presentation of the menu by the resident chef. A renowned sommelier from the country was responsible for presenting the pairings with Premium Cavas.

Production of an exclusive personalised brochure for each event. Tracking of the articles published.

Material sent to the participating companies with information on the event and the participants .







#### CAVA MASTERCLASS

Specialised Cava training at university and professional training centres, sommelier associations and for prescribers from the wine industry.

Given by renowned professionals from each country and by the technical services of the DOP Cava.

DÜSSELDORF - PROWEIN

KOBLENZ GHENT BERLIN COLOGNE WARSAW UTRECHT BRUSSELS (KBC) FORUM VINI ROTTERDAM LONDON WINE FAIR LONDON - FIZZ RUST (Austria)

+500 PROFESSIONAL PRESCRIBERS

#### TRAINING

Advanced Cava training at university and professional training centres nationally. Given by the Technical Services of the DOP Cava, as well as other organisations.

ESHOB (2) CETT (2) BASQUE CULINARY CENTER (3) AULA DEL VINO – UNIV. SAN PABLO CEU VINOSELECCIÓN

ESC. INTERNACIONAL VALLADOLID ROVIRA I VIRGILI UNIVERSITY MADRID CHAMBER OF COMMERCE BURGOS UNIVERSITY BURGOS CHAMBER OF COMMERCE EL CORTE INGLÉS – Cellar staff IC TRAINERS' COURSE



PREMIUM CAVA FAIR

Action to promote Premium Cava for the trade press, restaurants, specialist stores and other prescribers from the gastronomy and wine sectors.

Round table on "The harmonies of Cava" with the participation of local professionals from the industry.

Harmonies cocktail.

Premium Cava showroom with the participation of cava producers.

Location: Malaga Participation of 26 companies.











### "BEST INTERNATIONAL SOMMELIER FOR CAVA" COMPETITION

Second "Best Sommelier for Cava" competition, this time in its international version.

Semi-finals in 11 towns and cities covering the different areas in Spain:

CATALONIA AND ANDORRA BALEARIC ISLANDS CENTRE 1 (MADRID & CASTILE-LA MANCHA) CENTRE 2 (CASTILE-LEON) NORTH 1 (BASQUE COUNTRY & CANTABRIA) NORTH 2 (ASTURIAS & GALICIA) EBRO VALLEY (ARAGON & NAVARRE) CANARY ISLANDS ANDALUSIA 1 (SOUTH-EAST) ANDALUSIA 2 (SOUTH-WEST)

International semi-finals in BELGIUM and MEXICO.



MARRIE AL FORMACIÓN MARRIE AL

1400008 AL POPTADO 800 EURO 904 CONCISSO 904 CONCISSO

#### FAM TRIPS

#### INTERNATIONAL

Visits to the main DOP Cava region organised for the trade press and Masters of Wine from all over the world.

Masterclass given by our technical services.

Visits to different cava producers.

CANADA – Daenna Van Mulligan NETHERLANDS – Frank Smulders MW UNITED KINGDOM – Andrew Jefford - Richard Hemming MW SWEDEN – Eric Stein BELGIUM – Pedro Ballesteros POLAND –Group of journalists 50 GREAT CAVAS – Group of journalists USA - Group of Oenologists Washington

#### NATIONAL

Basque Culinary Center – Students of the Sommelier Master Journalists Trade Magazines









#### **TASTINGS**

TOM STEVENSON GUÍA PEÑÍN





#### CAVA MIXOLOGY

#### TRAINING

Specialised training in making cocktails with Cava to show its versatility as a mixer.

Production of three cocktails from the DOP Cava: Pink&Mint Cava, Cavatropic and Cava Loves Tea.

Aim: To promote Cava among young consumers and professionals of the world of cocktails and bartenders.

BARCELONA - CETT SAN SEBASTIÁN – BCC

#### COMPETITION - CLASS CAVA CUP

International bartender competition in the United Kingdom. The aim was to present them with Cava as a mixer and encourage its use to get us closer to young consumers. Event organised in collaboration with the trade magazine *Class Cup Magazine*. LONDON – RED BAR





### FINANCIAL PRESS CUTTINGS

Annual presentation of Cava industry statistics to the national press.



#### SPECIAL RNE PROGRAMME

New edition of the special programme "Cava and Christmas" by RNE. Broadcast live from the CaixaForum Madrid, in front of more than 400 people.

Interviews and sections related to Cava.

### MICRO-STORY COMPETITION #RELATOCAVA

Social media competition to raise awareness and promote the use of the word Cava among Facebook and Twitter users. The aim is to raise awareness and visibility of the DO Cava, as well as encourage interaction on our social media sites.



### LLIBRE VERD DE LA VINYA DEL CAVA (GREEN BOOK OF CAVA VINEYARDS)

Book written and published by the DOP Cava. A homage to the land, showing the hard work of winegrowers and the importance of good practices in viticulture.

Available in Catalan, Spanish and English.

Can be downloaded in PDF from www.docava.es

#### **NEW WEBSITE**

New website for the Cava Regulatory Board www.docava.es Updating of content and new sections. More dynamic, user-friendly and with a responsive format.



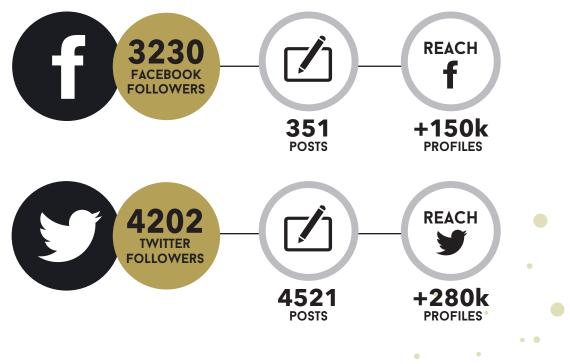


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#### SOCIAL MEDIA



#### **SPONSORSHIPS**

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CAVATAST CONGRESO HOST – BCC PREMIS VINARI FUND. DIETA MEDITERRANEA

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#### **OTHER EVENTS**

#### **FUN FEST**

Educational Cava tastings for end consumers. Pairing of Reserva Cava with pâtés and Rosé Cava with strawberries. Organised by Atrápalo.com at the Poble Espanyol in Barcelona. Participation of 12 companies.



Espai Cava in the Cloister of Saint Francesc in Vilafranca during the Vijazz festival. Two concerts performed exclusively by women. Pairing of rosé cava with strawberries. Tickets supporting the fight against breast cancer.

Participation of 35 companies.

#### APM - EM DIC MANEL

Sponsorship with product placement in the digital transmedia series #Emdicmanel by TV3. Episode written by the DO Cava about cava and gastronomy with the chef Nandu Jubany and bloggers and influencers from the world of gastronomy as actors. Big impact on digital platforms and social media. Action #pelisambcava on Twitter



#### ALIMENTARIA

Collaboration at the event to celebrate the 40th anniversary of Alimentària.

Celebratory cake made by Oriol Balaguer and 40 bottles of cava opened.

