D.O. CAVA

Global report 2023

www.cava.wine

D.O. CAVA

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#BetterWithCava

1. Preliminary notes

SHIPMENTS

The shipment data come from the information provided to the DO Cava Regulatory Board by associated wineries.

Shipment data are shown in numbers of bottles (in bottles or in thousands of bottles, as indicated).

The shipment data correspond to the number of bottles of Cava produced, that is to say, the finished product. This figure is not the same as the sales figure as not all bottles are sold in the same year as they are produced.

DOMESTIC AND EXTERIOR MARKET

The Foreign and Domestic Market data correspond to the bottles sold in the respective markets reported by the wineries associated with the Control Board. These sales data are shown in number of bottles (in bottles or in thousands of bottles, as indicated).

DOMESTIC CONSUMPTION

National Cava consumption figures are provided by consultancy firm Circana and correspond to the total Market.

Circana is a leading consultancy firm in the global food and beverage sector worldwide.

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This document can be downloaded from the DO Cava website:

www.cava.wine/en

2. Memory 2023

After the economic and geopolitical difficulties experienced in the 2022 financial year, 2023 delivered excellent results.

Total sales volume amounted to 251.8 million bottles, representing a significant increase of 1.09% compared to 2022. Sales to foreign markets, representing 68% of the D.O.'s total sales, demonstrate the universality of Cava and its ability to cross borders. Abroad, Germany maintained its position as the main consumer country (4.14%), followed by Belgium, the United States and the United Kingdom. Sweden continued its solid growth in the ranking of the top five markets (6.32%), followed by Japan, highlighting the extraordinary reception of Cava in a monopolistic market with a more limited penetration. Also noteworthy is the development in emerging markets with good growth potential such as Brazil (75.82%), Poland (34.62%) and Estonia (31.49%) with impressive increases. Sales in the domestic market went up by a remarkable 4.02%, reaching 80,936,000 bottles in Spain, proving that ever increasing numbers of consumers in its country of origin prefer Cava.

The channel with the greatest impact was the on-trade channel, with an increase of 6.9% in value and 1% in volume, while the off-trade channel continued its upward trend, driven by the return to physical purchases, with a significant increase of 10.7% in value and 3.9% in volume. Within the sparkling wine category, in the food channel, the Cava category stands out as the one with the highest growth in value, with Cava up by 10.6%, while Champagne was down by 4.3%; other sparkling wines were up 7.8%, and Granvas up 0.6%. In addition, Cava experienced the highest growth in volume, up 3.9%, while Champagne was down by 11.7%, with other sparkling wines up 1.9%, and Granvas down by 18.01%. The offline and online channels also stand out with positive developments in value, namely an increase of 10.7% and 3.9%, and 5.2% and 3.9% in volume respectively.

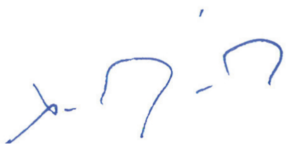
The success of the D.O Cava's commitment to ecology, sustainability and higher-value Cavas with long ageing shows evidence of unprecedented growth. The category of organic Cava stands out within the D.O. Cava, due to the new regulations that set 2025 sold in this category as the decisive year for the entire category of Guarda Superior to be 100% organic. The number of bottles in this category now exceeds 32,366,000 units, with an impressive growth of 24.59% compared to 2022. This demonstrates the consolidation of a category with significant demand that is in a state of transition for a number of winemakers in the Designation of Origin. These results position D.O. Cava as a pioneer in the integrated classification of a 100% organic product category.

Among the most noteworthy trends in 2023, rosé Cavas managed to move up the rankings, growing by 3.31% and reaching 23.5 million bottles sold. Last year Cavas de Guarda Superior with the new minimum ageing regulation of 18 months for Cavas de Guarda Superior Reserva (previously 15 months), were launched on the market, with an organic vocation in specific vineyards. The fresh approach and joint efforts of the sector taken by the strategic commitment of the D.O. Cava in the new segmentation and zoning continue to prove that it is heading in the right direction, with a strong focus on the sustainability of the territory and the production of Cava, all with the guarantee that only a Designation of Origin can provide.

In this sense, 2024 will be a year of continued commitment to the qualitative axis on the part of all the associates of the Cava Designation of Origin who seek to go further by joining forces. The implementation of the Strategic Plan for the segmentation and zoning of Cava continues, supported by a programme to strengthen the D.O. Cava's quality controls and a rigorous system of product information and traceability. The new quality seals under this recent regulation, which indicate the origin and product segment, are already available, so customers can make a more informed purchasing decision. This considerable investment is already beginning to bear fruit, showing the positive results of the united dedication shown by all those associated with the Designation of Origin.

The year 2023 was marked by a strong global promotional programme, allowing numerous prescribers and bubble-lovers to taste and learn about the versatility and excellence of Cava. The exclusive Cava Academy programme now has more than 590 certified professionals around the world, expanding the network of Cava trainers in several strategically important consumer markets. As part of the communication strategy, the D.O. will continue its commitment to the education and promotion of Cava at a national and international level in order to encourage year-round consumption. Its action plan positions Cava as the ideal choice to accompany and enhance every global cuisine, positioning it among the most versatile quality bubbles.

Demonstrating that Cava is the gastronomic drink par excellence, thanks to its infinite versatility in matching with any dish, is a current challenge and one of the main objectives in the promotion of Cava. The Cava Protected Designation of Origin thus stands as the guarantor of its territory, of its renowned landscape, and of a highly representative Spanish economic sector. The quest for excellence must coexist with respect for the land and a legacy that will transmit the value of a product as exciting as Cava to present and future generations.



Javier Pagés Font
President of the DOP Cava Regulatory Board

3. Key Figures 2023

213.8
MILLION
KG OF GRAPES

TOTAL SALES
251,839,000

1.09%
↑ S/ 2022

NON-ORGANIC CAVA SALES
219,473,000

-1.65 %
↓ S/ 2022

ORGANIC CAVA SALES
32,366,000

24.60%
↑ S/ 2022

ROSÉ CAVA SALES
23,497,000

3.30 %
↑ S/ 2022

200
CAVA PRODUCERS

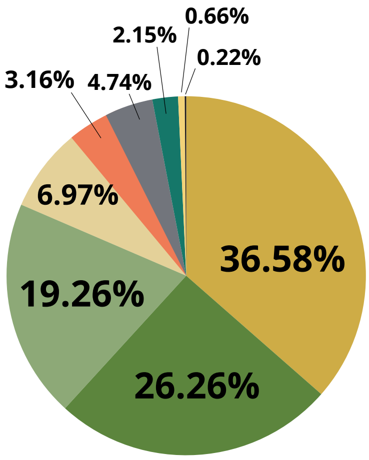
145
BASE WINE PRODUCERS

Number of operators
2023
—
6,088

Registered surface area (Ha)
2023
—
38,099.00 Hectares

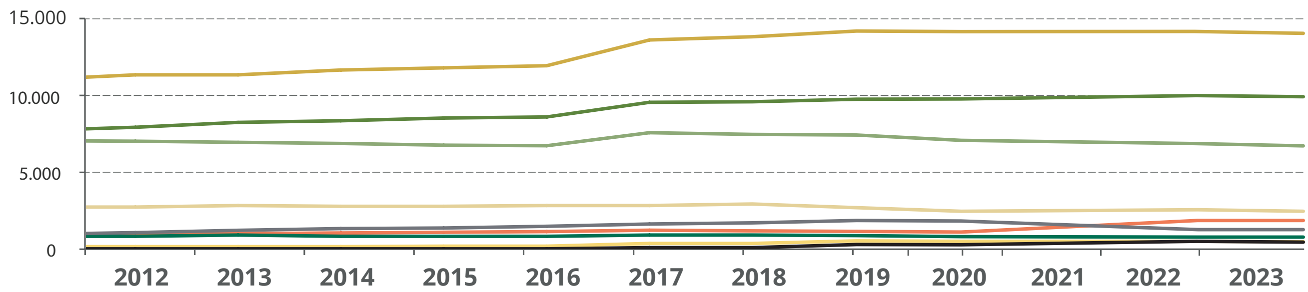
4. Registrations

4.1 REGISTERED SURFACE AREA BY VARIETY



	2023 (Ha)
MACABEO	13,932
XAREL·LO	10,003
PARELLADA	7,337
CHARDONNAY	2,655
GARNACHA TINTA	1,805
TREPAT	1,203
PINOT NOIR	817
SUBIRAT PARENT	253
MONASTRELL	82
TOTAL	38,087

* In Hectares.



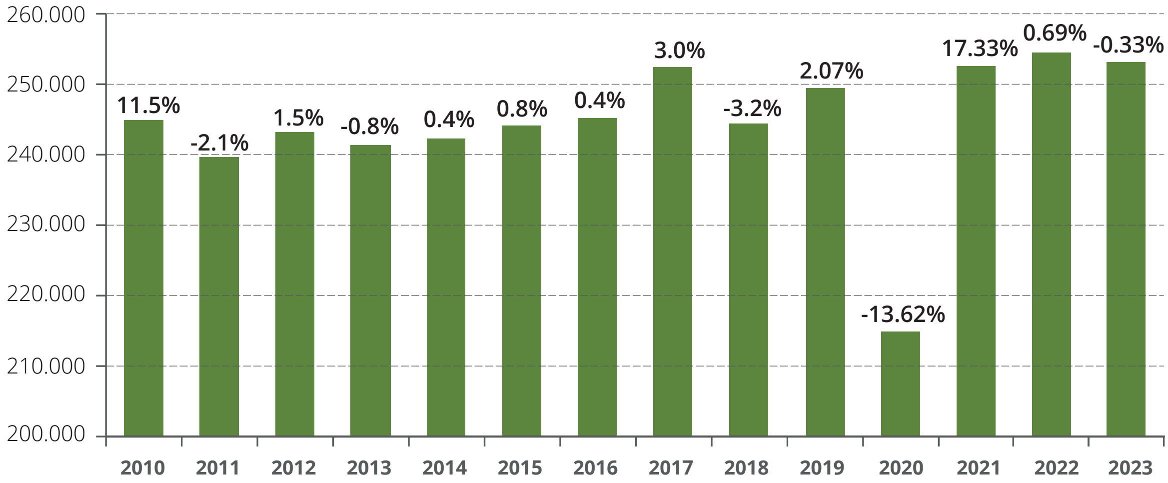
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
MACABEO	11,390	11,420	11,718	11,847	11,996	13,639	13,828	13,909	13,955	13,966	13,966	13,932
XAREL·LO	7,971	8,293	8,392	8,566	8,626	9,558	9,599	9,603	9,825	9,841	10,014	10,003
PARELLADA	7,044	6,994	6,931	6,816	6,772	7,563	7,472	7,451	7,385	7,345	7,343	7,337
CHARDONNAY	2,903	2,971	2,925	2,926	2,965	2,989	3,036	2,935	2,881	2,848	2,785	2,655
GARNACHA TINTA	1,076	1,237	1,346	1,377	1,453	1,616	1,673	1,776	1,783	1,801	1,797	1,805
TREPAT	1,004	1,013	1,057	1,103	1,109	1,179	1,168	1,164	1,177	1,185	1,206	1,203
PINOT NOIR	866	883	848	837	853	875	873	808	817	811	824	817
SUBIRAT PARENT	73	73	72	78	88	235	225	232	250	250	256	253
MONASTRELL	28	30	36	41	41	52	50	77	78	81	83	82
TOTAL	**32,355**	**32,914**	**33,325**	**33,591**	**33,903**	**37,706**	**37,924**	**37,955**	**38,152**	**38,133**	**38,274**	**38,087**

* In Hectares.

5. Shipments

Total production 2023	Variation S/2022
253,838,296 bottles	**-0.33%**

THOUSANDS OF BOTTLES

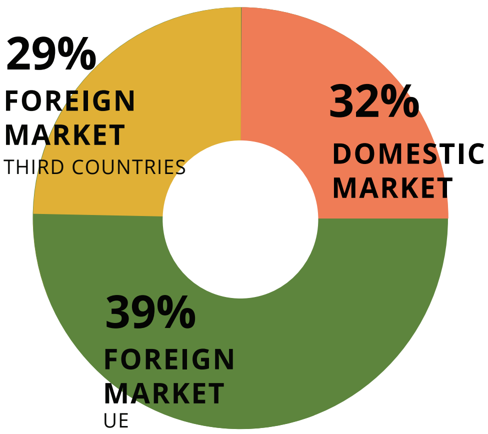


2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
244,801	239,555	243,232	241,365	242,288	244,123	245,156	252,512	244,472	249,544	215,566	252,931	254,683	253,838

* In thousands of bottles.

6. Cava around the world

6.1 SALES IN THE DOMESTIC MARKET AND FOREIGN MARKET



TOTAL Foreign Market Third countries	% change
72,719	-5.20%
Total Foreign Market UE	% change
98,184	3.76%
Total Domestic Market	% change
80,936	4.02%
Total Market	% change
251,839	1.09%

* In thousands of bottles.

7. Foreign Market countries

7.1 FOREIGN MARKET. TOP 20 COUNTRIES.

RK 2023	COUNTRY	Dif. Ranking	% change	THOUSANDS OF BOTTLES 2022	2023
1	Germany	=	4.14%	29,893	31,132
2	Belgium	+1	5.44%	20,940	22,079
3	U.S.	-1	-13.48%	21,619	18,704
4	UK	=	5.38%	16,892	17,800
5	Sweden	=	6.32%	11,784	12,529
6	France	+1	-0.78%	10,397	10,316
7	Japan	-1	-12.93%	11,123	9,685
8	Netherlands	=	0.52%	8,285	8,328
9	Russia	=	-13.75%	7,477	6,449
10	Brazil	+3	75.82%	1,898	3,337
11	Canada	-1	-4.57%	3,262	3,133
12	Poland	=	34.62%	2,146	2,889
13	Switzerland	-2	-2.46%	2,678	2,612
14	Denmark	+1	1.15%	1,746	1,766
15	Finland	-1	-8.78%	1,867	1,703
16	Ukraine	+3	43.13%	939	1,344
17	Norway	=	8.18%	1,198	1,296
18	Austria	-2	-12.37%	1,407	1,233
19	Estonia	+1	31.49%	870	1,144
20	Israel	+1	8.03%	922	966

7. Foreign Market countries

7.2 FOREIGN MARKET. RANKING TOP 50 COUNTRIES.

RK 2023	COUNTRY	BOTTLES	% chan.
1	Germany	31,132	4.14%
2	Belgium	22,079	5.44%
3	United States	18,704	-13.48%
4	UK	17,800	5.38%
5	Sweden	12,529	6.32%
6	France	10,316	-0.78%
7	Japan	9,685	-12.93%
8	Netherlands	8,328	0.52%
9	Russia	6,449	-13.75%
10	Brasil	3,337	75.82%
11	Canada	3,113	-4.57%
12	Poland	2,889	34.62%
13	Switzerland	2,612	-2.46%
14	Denmark	1,766	1.15%
15	Finland	1,703	-8.78%
16	Ukranie	1,344	43.13%
17	Norway	1,296	8.18%
18	Austria	1,233	-12.37%
19	Estonia	1,144	31.49%
20	Israel	996	8.03%
21	Lithuania	967	-0.20%
22	Luxembourgh	866	16.42%
23	Mexico	824	-15.23%
24	Italy	765	33.45%
25	Latvia	665	-10.54%

* In thousands of bottles.

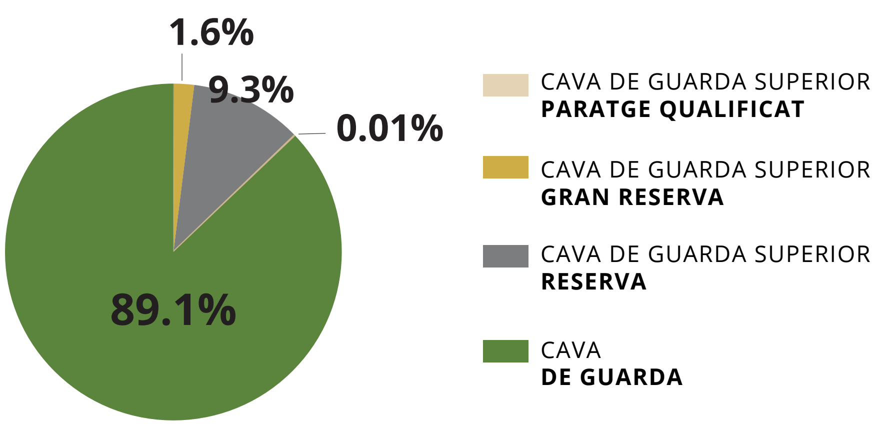
RK 2023	COUNTRY	BOTTLES	% chan.
26	South Korea	592	-45.19%
27	Uruguay	471	83.80%
28	Portugal	461	-16.14%
29	Ireland	433	-19.55%
30	Dominican Rep.	374	8.58%
31	Czech Rep.	326	-4.17%
32	Puerto Rico	319	-22.73%
33	Croatia	316	30.26%
34	Australia	304	-47.66%
35	Saint Kitts and Nevis	298	24.25%
36	China	287	-37.21%
37	Chile	218	-21.30%
38	Cuba	206	30.34%
39	Peru	198	-23.21%
40	Cyrpus	185	118.39%
41	Panama	182	-18.79%
42	Bulgaria	152	82.93%
43	Costa Rica	140	-30.41%
44	Hong-Kong	140	-36.45%
45	Equador	134	-31.69%
46	Belarus	121	27.79%
47	Philippines	116	-0.77%
48	Iceland	116	-19.91%
49	Romania	110	27.59%
50	Andorra	110	10.37%

8. Sales by category

8.1 SEGMENTATION

	2023	% evol.
CAVA GUARDA SUPERIOR **PARATGE QUALIFICAT** Mín. 36 mesos	15,000	-25.00%
CAVA DE GUARDA SUPERIOR **GRAN RESERVA** Mín. 30 mesos	4,026,000	-5.43%
CAVA DE GUARDA SUPERIOR **RESERVA** Mín. 18 mesos	23,376,000	-18.42%
CAVA **DE GUARDA** Mín. 9 mesos	224,422,000	3.80%
TOTAL	**251,839,000**	**1.09%**

* In bottles.

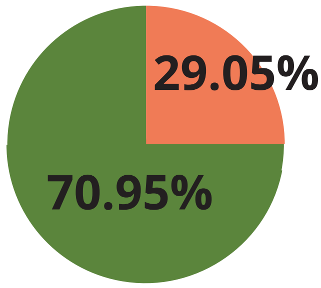


8. Sales by category

8.2 SEGMENTATION BY DOMESTIC MARKET AND FOREIGN MARKET

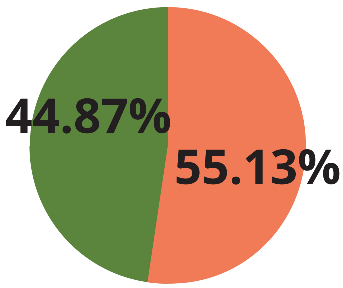
	2023	% evol.
CAVA **DE GUARDA**	224,422	**3.80%**
Domestic Market	65,187	10.28%
Foreign Market	159,235	1.36%

*In thousands of bottles.



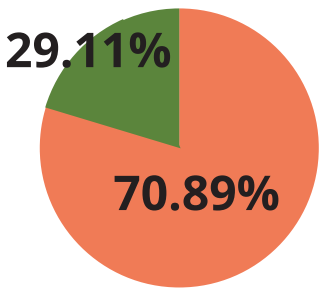
CAVA DE GUARDA SUPERIOR **RESERVA**	**23,376**	**-18.42%**
Domestic Market	12,887	-17.53%
Foreign Market	10,489	-19.45%

*In thousands of bottles.



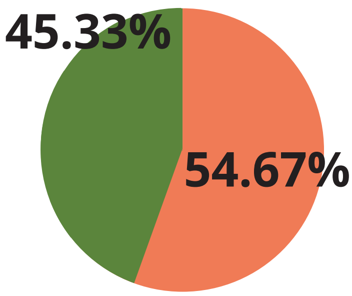
CAVA DE GUARDA SUPERIOR **GRAN RESERVA**	**4,026**	**-5.43%**
Domestic Market	2,854	-6.46%
Foreign Market	1,172	-2.82%

*In thousands of bottles.



CAVA DE GUARDA SUPERIOR **PARAJE CALIFICADO**	**15,0**	**-26.11%**
Domestic Market	8,2	-47.77%
Foreign Market	6,8	47.83%

*In thousands of bottles.



DOMESTIC MARKET

FOREIGN MARKET

8. Sales by category

8.3 SALES RANKING BY COUNTRY

CAVA DE GUARDA		
1	Germany	30,681
2	Belgium	20,371
3	U.S.	17,566
4	UK	17,355
5	Sweden	11,336
6	France	10,256
7	Japan	8,680
8	Netherlands	7,130
9	Russia	6,185
10	Brazil	3,279
11	Poland	2,700
12	Switzerland	2,412
13	Canada	2,251
14	Denmark	1,600
15	Finland	1,453
16	Ukraine	1,273
17	Austria	1,209
18	Israel	981
19	Estonia	977
20	Luxembourgh	856
21	Lithuania	843
22	Norway	808
23	Mexico	714
24	Italy	669
25	Latvia	592
26	Uruguay	469
27	South Korea	443
28	Ireland	398
29	Portugal	371
30	Dominican Rep.	314
31	Croatia	309
32	Australia	292
33	Puerto Rico	285
34	Czech Rep.	283
35	China	272

* Thousands of bottles.

CAVA DE GUARDA SUPERIOR RESERVA		
1	Belgium	1,642
2	Sweden	1,169
3	Netherlands	1,148
4	U.S.	980
5	Japan	795
6	Canada	709
7	UK	433
8	Norway	421
9	Germany	418
10	Russia	263
11	Finland	235
12	Saint Kitts and Nevis	185
13	Switzerland	178
14	Poland	177
15	Estonia	153
16	Denmark	146
17	Lithuania	105
18	Mexico	99
19	South Korea	93
20	Perú	89
21	Italy	86
22	Latvia	68
23	Portugal	62
24	France	59
25	Brazil	54
26	Dominican Rep.	49
27	Taiwan	47
28	Ukraine	43
29	Czech Rep.	36
30	Ireland	33
31	Panamá	32
32	Cuba	31
33	Puerto Rico	30
34	Romania	29
35	Hong-Kong	28

* Thousands of bottles.

8. Sales by category

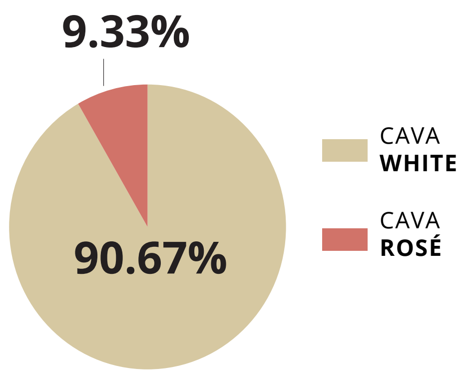
CAVA DE GUARDA SUPERIOR GRAN RESERVA		
1	Japan	210
2	U.S.	159
3	Canada	153
4	Norway	67
5	Belgium	66
6	South Korea	57
7	Netherlands	50
8	Germany	34
9	Ukraine	29
10	Portugal	27
11	Switzerland	22
12	Sweden	22
13	Denmark	21
14	Lithuania	19
15	Finland	16
16	Estonia	15
17	Poland	13
18	UK	12
19	Iceland	12
20	Dominican Rep.	11
21	Mexico	11
22	Andorra	10
23	Austria	10
24	Perú	10
25	Italy	10
26	Romania	8
27	Spain (free zones)	8
28	Australia	7
29	Czech Rep.	7
30	Korea	7
31	Latvia	5
32	Luxembourgh	5
33	Sant Kitts and Nevis	4
34	Brazil	4
35	Puerto Rico	4

* Thousands of bottles.

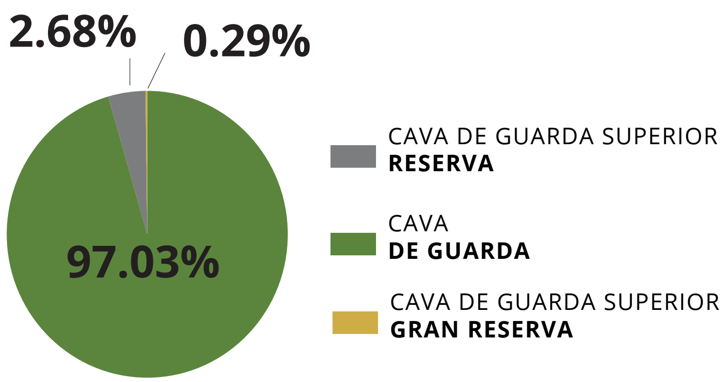
CAVA DE GUARDA SUPERIOR PARAJE CALIFICADO		
1	Sweden	2,403
2	Singapur	872
3	Belgium	544
4	China	372
5	Colombia	360
6	U.S.	212
7	Ukraine	173
8	Spain (free zones)	167
9	Estonia	161
10	UK	135
11	Canada	120
12	Finland	108
13	Germany	105
14	Netherlands	93
15	Hong-Kong	91
16	Portugal	61
17	Ireland	60
18	Republic of South Africa	60
19	Switzerland	48
20	Andorra	45
21	Hungary	36
22	Mexico	36
23	Luxembourgh	31
24	Romania	31
25	Thailand	31
26	France	25
27	Norway	21
28	Poland	17
29	Croatia	7
30	Japan	7

* Number of bottles.

9. Sales of Rosé Cava



BASE: TOTAL CAVA



BASE: TOTAL ROSÉ CAVA

	2022	2023	% evol.
WHITE CAVA	226,389,000	228,340,000	0.86%
ROSÉ CAVA	22,746,000	23,499,000	3.31%
TOTAL CAVA	249,135,000	251,839,000	1.09%
	9.84%	9.33%	

* Number of bottles.

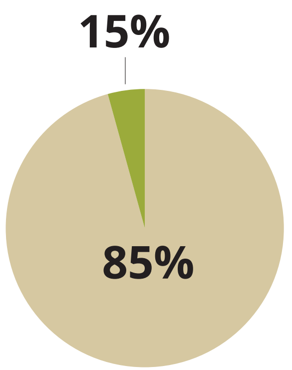
% ROSÉ CAVA OF TOTAL CAVA PRODUCED.

ROSÉ CAVA	2022	2023	% evol.
CAVA	22,015,000	22,800,000	3.57%
CAVA RESERVA	679,000	629,000	-7.22%
CAVA GRAN RESERVA	52,000	68,000	30.77%
TOTAL ROSÉ	22,746,000	23,499,000	3.31%
	4.26%	2.97%	

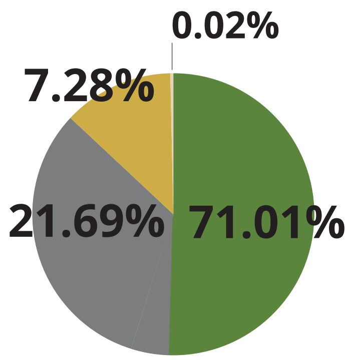
* Number of bottles.

% PREMIUM ROSÉ CAVA OF TOTAL CAVA PRODUCED.

10. Sales of organic Cava



BASE:
TOTAL CAVA



BASE:
TOTAL ORGANIC CAVA

Total comercialització Non-Organic Cava	% evol.
219,473,000	-1.65%
Total comercialització Organic Cava	**% evol.**
32,366,000	24.59%
Total Cava	**% evol.**
251,839,000	1.09%

% ORGANIC CAVA OF TOTAL CAVA PRODUCED. 12.75%

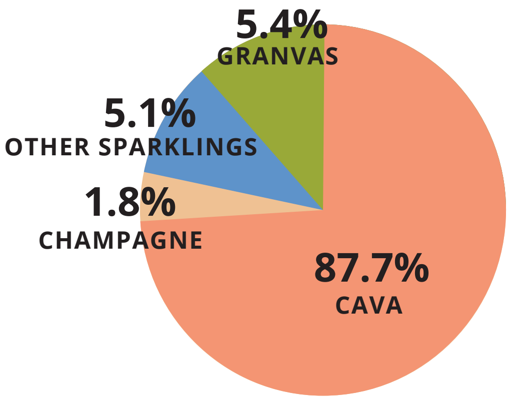
Total comercialització Cava De Guarda	% evol.
22,982,000	44.34%
Total comercialització Cava De Guarda Superior Reserva	**% evol.**
7,019,000	-6.89%
Total comercialització Cava De Guarda Superior Gran Reserva	**% evol.**
2,357,000	-6.10%
Total comercialització Cava De Guarda Superior De Paratge Qualificat	**% evol.**
7,700	20.31%
Total Organic Cava	**% evol.**
32,366,000	24.60%

% PREMIUM ORGANIC CAVA OF TOTAL ORGANIC CAVA PRODUCED. 28.99%

11. Domestic Market Consumption

11.1 SPARKLING WINES CATEGORIES (BY SUB-CATEGORIES)

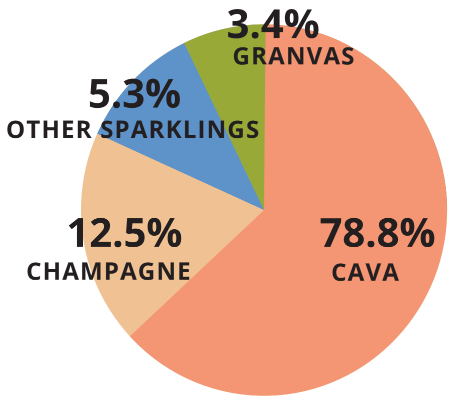
VOLUME (% UNITS)



SPARKLING WINES: +2.5%

(Volume variation)

VALUE (% EUROS)



SPARKLING WINES: +6.6%

(Value variation)

% CHANGE FROM PREVIOUS YEAR		
	VOLUME	VALUE
SPARKLING WINES	2.0%	8.0%
CAVA	3.9%	10.6%
CHAMPAGNE	-11.7%	-4.3%
OTHER SPARKLING	1.9%	7.8%
GRANVAS	-18.1%	0.6%

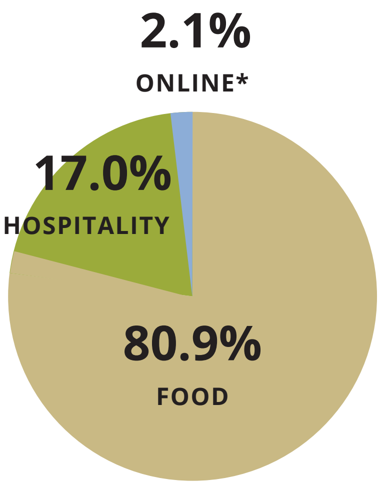
* Source: Circana. Data for total mobile year ending January 2023.

11. Domestic Market Consumption

Circana.

11.1 DISTRIBUTION AND EVOLUTION OF CONSUMPTION BY CHANNEL

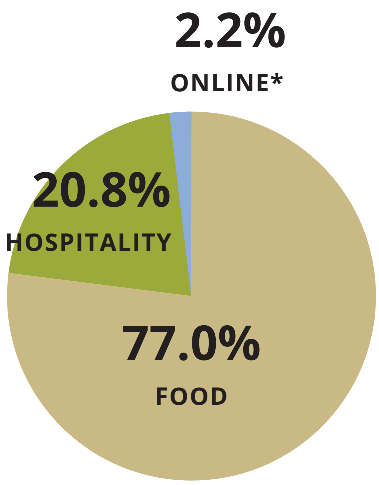
VOLUME (% UNITS)



CAVA: +3.4%

(Volume variation)

VALUE (% EUROS)



CAVA: +9.8%

(Value variation)

*The online channel includes sales from chains that sell online (not specialist wine websites).

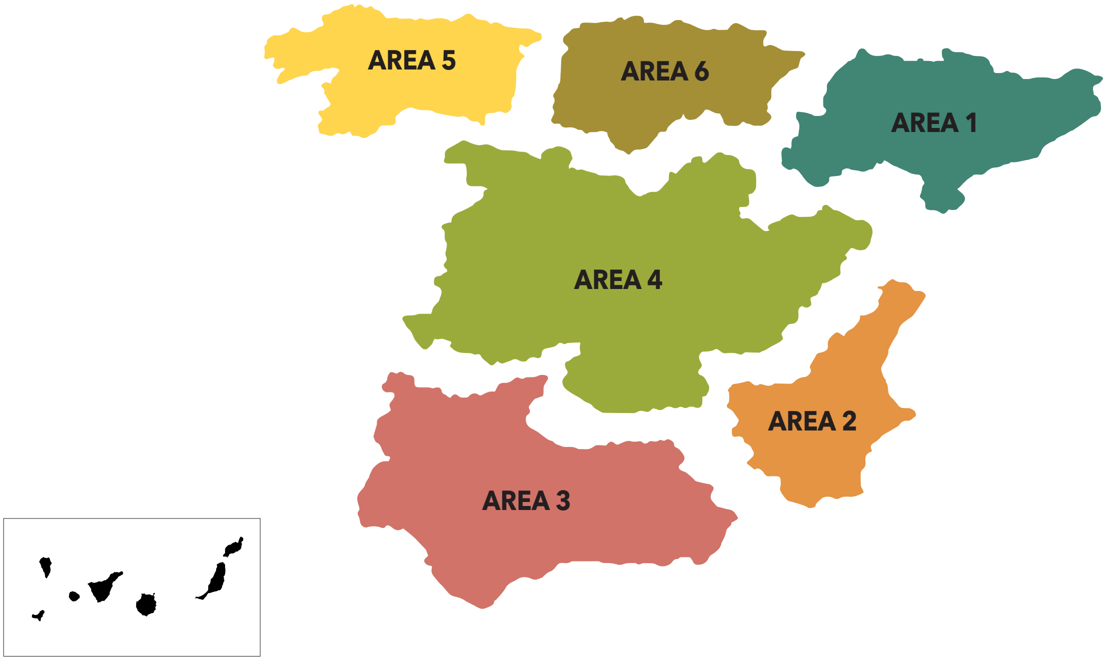
% CHANGE FROM PREVIOUS YEAR		
	VOLUME	VALUE
FOOD	+ 3.9%	+ 10.6%
HOSPITALITY	+ 1.0%	+ 6.9%
ONLINE (H+S)	+ 5.2 %	+ 7.3 %

* Source: Circana. Data for total mobile year ending January 2023.

11. Domestic Market Consumption

Circana.

11.2 DISTRIBUTION OF CONSUMPTION BY GEOGRAPHICAL AREA



	Volume (% Unid.)	% chan.	Value (% Euros)	% chan.
AREA 1 NORTH-EAST	25.5%	4.5%	26.2%	12.1%
BARCELONA METROPOLITAN AREA	15.4%	0.9%	16.7%	6.4%
AREA 2 CENTRE-WEST	17.5%	5.2%	15.1%	12.6%
AREA 3 SOUTH	13.1%	7.5%	11.8%	16.0%
AREA 4 CENTRE	3.3%	-0.1%	3.1%	8.7%
MADRID METROPOLITAN AREA	5.8%	0.1%	6.4%	6.7%
AREA 5 NORTH-WEST	4.4%	4.5%	4.4%	10.3%
AREA 6 NORTH	6.9%	-0.4%	7.4%	5.3%
AREA CANARY ISLANDS	5.7%	9.4%	6.2%	14.8%

+3.9% VOLUME **+10.7% VALUE**

* Source: Circana. Data for total mobile year ending January 2023.

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