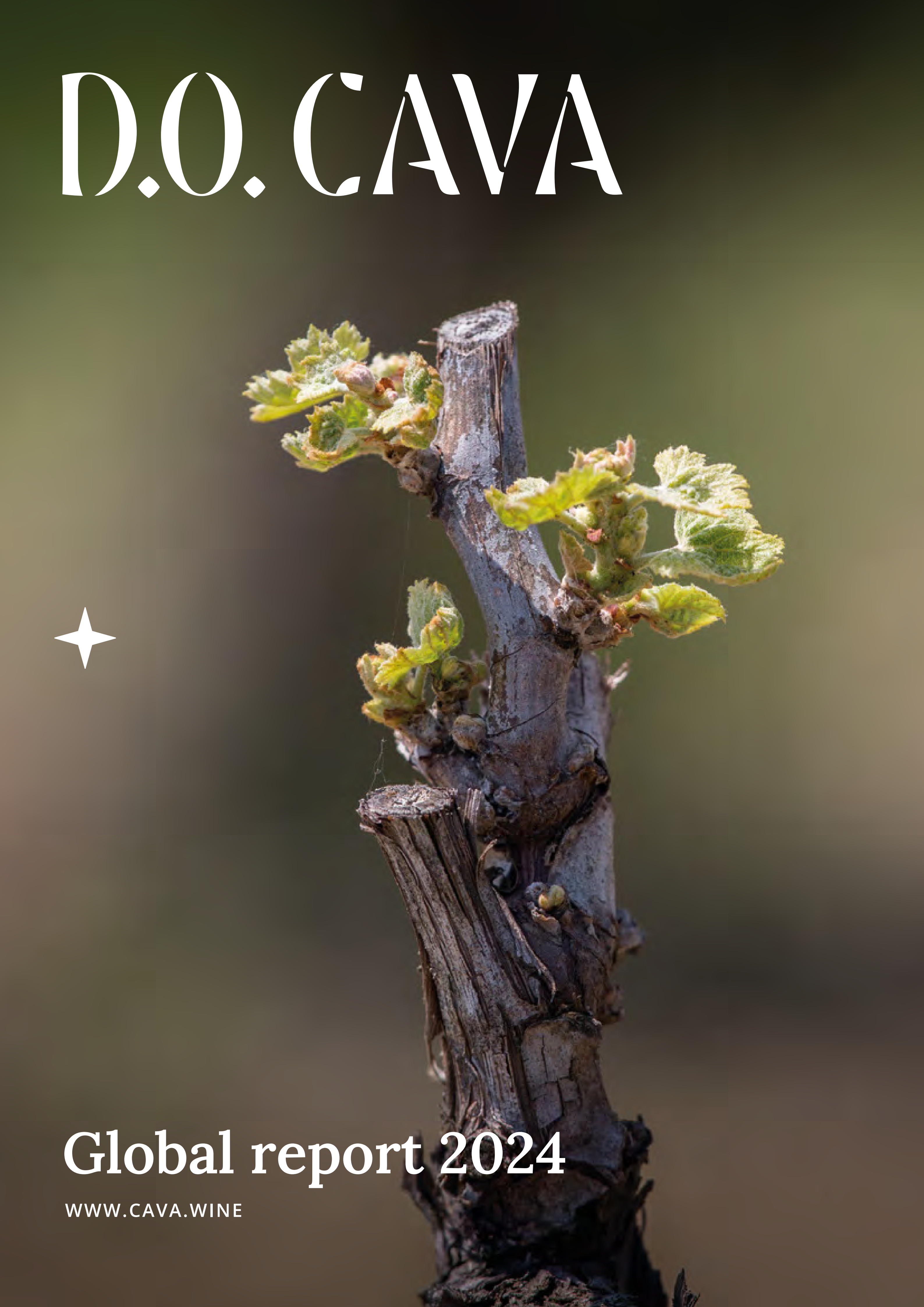

D.O. CAVA

Global report 2024

WWW.CAVA.WINE

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#BetterWithCava

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1. Preliminary notes

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.

This document can be downloaded from the DO Cava website:

www.cava.wine

2.

Despite the climatic challenges arising from the persistent drought, the Cava sector has demonstrated an exemplary capacity for adaptation and resilience in the face of these difficulties. This can be clearly seen in the continued recognition of Cava as a benchmark of quality and prestige, highly valued around the world.

As part of this commitment to excellence, and to the promotion of Cava, 2024 was notable for a successful targeted communication strategy. The Regulatory Council developed a prestigious global programme, strengthening key markets such as the United States, the United Kingdom and Japan, in addition to the domestic market. We enjoyed the support of renowned professionals, including **Masters of Wine, Master Sommeliers, specialised journalists, and prestigious communicators**, along with the support of **ICEX**, who together have been instrumental in strengthening the image and positioning of Cava.

Reverse missions were a key part of last year's programme. A total of 14 specialised journalists from Japan, the United States and the United Kingdom took part in activities and immersive visits to the heart of Cava. In addition, renowned experts such as Essi Avellan MW; Tom Hewson, Sommelier for the Tim Atkin Special Reports; and Mary Gorman-McAdams MW, also made trips to our region, as well as 30 international buyers, including notably the purchasing managers of the Pennsylvania monopoly in the US.

This strategy of activities and positioning was consolidated by various activations designed to strengthen the presence and image of Cava, highlighting its tradition, outstanding quality, and gastronomic versatility. Additionally, Cava held more than 20 training sessions at leading institutions such as the Institute of Masters of Wine and the Court of Master Sommeliers, as well as several well-established specialised events such as Spain's Great Match in New York, Aspen Food and Wine, Texsomm Conference, Salón de la Guía Peñín, and Barcelona Wine Week, among others. These were in addition to activities directly organised by the Cava Designation of Origin, such as one-to-one meetings with leading sommeliers, and prestigious actions such as the Cava *Route of Excellence* Showrooms in Barcelona and Madrid.

Another highlight is the **Cava Academy** training programme, which has already certified more than **760 professionals** worldwide, thus expanding the network of certified Cava educators in different markets. Furthermore, in collaboration with **WSET**, we have developed an additional Cava Academy classroom course exclusively for WSET educators, which has allowed us to further strengthen training and knowledge about Cava from the world's largest provider of wine qualifications.

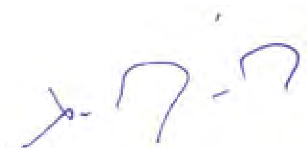
At a strategic level, D.O. Cava will continue to focus on education and promotion to position itself as the ideal wine for any occasion. The Designation of Origin continues to offer a benchmark for quality, respecting the territory's legacy and sustainability, with the aim of leaving a positive legacy for future generations.

In terms of sales, the total amounts to **218.1 million bottles**, which represents a decrease of 13.39% compared to 2023. However, it should be noted that demand continues to outstrip supply, especially at a time when Cava, as a quality sparkling wine, is enjoying excellent global acceptance. **Exports continue to demonstrate Cava's universal appeal, representing 64% of total sales**. The restriction of product sales has been mainly concentrated in one market, Germany. With the shrinking of the German market, **Belgium has consolidated its position as the main export market**, followed by the United States and the United Kingdom. In addition, countries such as Sweden, Japan and the Netherlands showed a slight growth in their imports.

The Designation of Origin's focus on ecology, sustainability and the production of higher-value Cavas with long ageing has generated exceptional growth. The category of organic Cava particularly stands out, thanks to the new regulations that consolidate the category of **100% organic Guarda Superior** by 2025. The number of bottles sold exceeded 37.2 million, with a significant double-digit increase of 15.23%, consolidating a sought-after category that follows market trends and evolution.

The Cava D.O.'s segmentation and zoning plan, together with its firm commitment to sustainability, continues to yield positive results. **A rigorous system of monitoring and traceability from the vineyard to the final product** guarantees the quality that distinguishes Cava from other sparkling wines, an exclusive assurance that only a Denomination of Origin can offer.

Javier Pagés Font
President of the DOP Cava Regulatory Board



Key figures 2024

3.

Key figures 2024

NUMBER
OF HOLDINGS
5,874

REGISTERED
SURFACE AREA (Ha)
37,502

MILION KG
OF GRAPES
219,50

CAVA
PRODUCERS
200

BASE WINE
PRODUCERS
143

ELABORADOR · INTEGRAL ·

INTEGRAL
PRODUCERS
17

TOTAL SALES
218,113,000

NON-ORGANIC
CAVA SALES
180.816
MILLION OF BOTTLES

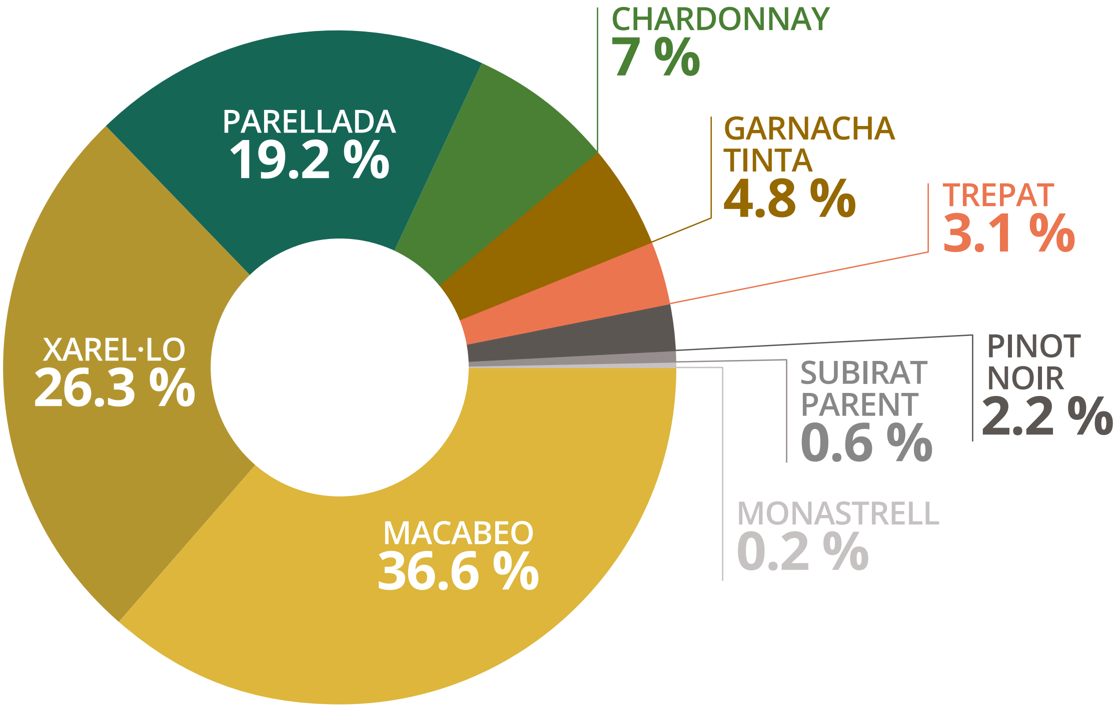
ORGANIC
CAVA SALES
37.297
MILLION OF BOTTLES

ROSÉ
CAVA SALES
18.047
MILLION OF BOTTLES

Registrations

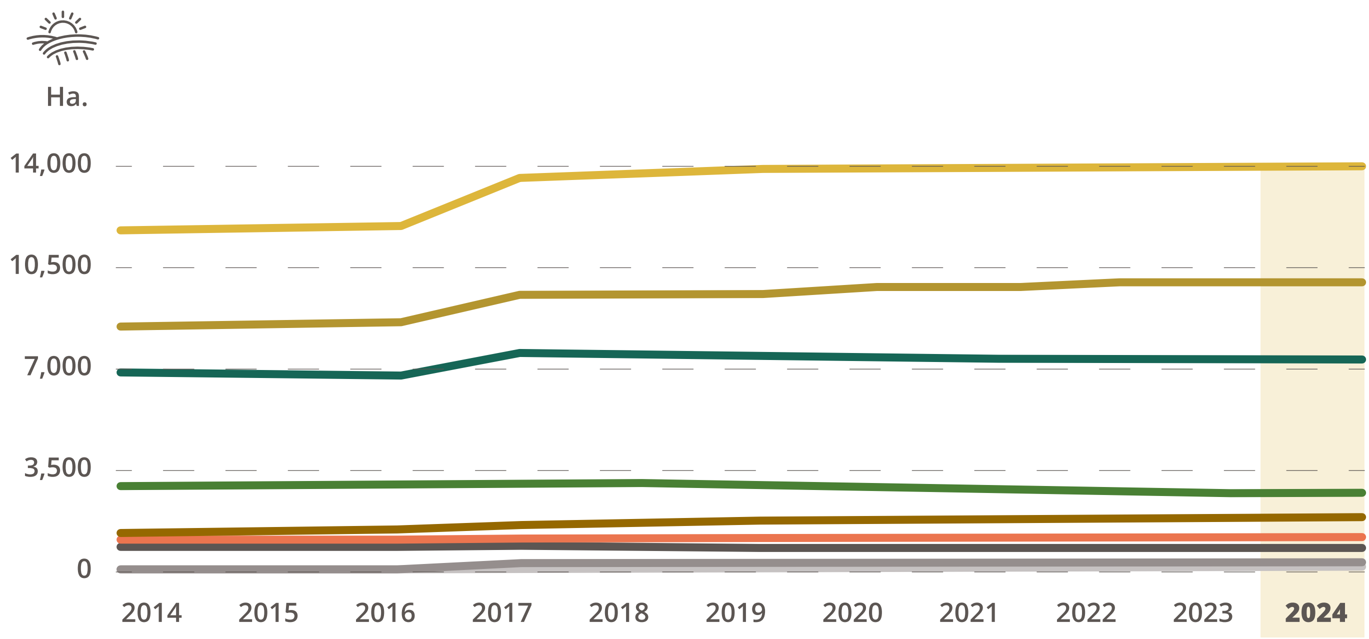
4.

Registered surface area by variety



HECTARES BY VARIETY	
MACABEO	13,728
XAREL·LO	9,847
PARELLADA	7,189
CHARDONNAY	2,617
GARNACHA TINTA	1,797
TREPAT	1,179
PINOT NOIR	823
SUBIRAT PARENT	243
MONASTRELL	79
TOTAL	37,502

Evolution 2014–2024

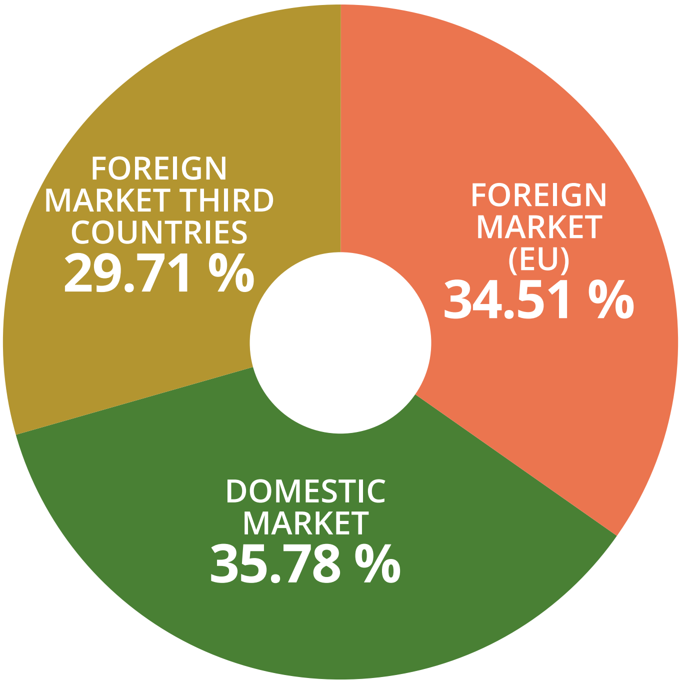


VARIETY	HECTARES 2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	**2024**
MACABEO	11,718	11,847	11,996	13,639	13,828	13,909	13,955	13,966	13,966	13,932	**13,728**
XAREL·LO	8,392	8,566	8,626	9,558	9,599	9,603	9,825	9,841	10,014	10,003	**9,847**
PARELLADA	6,931	6,816	6,772	7,563	7,472	7,451	7,385	7,345	7,343	7,337	**7,189**
CHARDONNAY	2,925	2,926	2,965	2,989	3,036	2,935	2,881	2,848	2,785	2,655	**2,617**
GARNACHA TINTA	1,346	1,377	1,453	1,616	1,673	1,776	1,783	1,801	1,797	1,805	**1,797**
TREPAT	1,057	1,103	1,109	1,179	1,168	1,164	1,177	1,185	1,206	1,203	**1,179**
PINOT NOIR	848	837	853	875	873	808	817	811	824	817	**823**
SUBIRAT PARENT	72	78	88	235	225	232	250	250	256	253	**243**
MONASTRELL	36	41	41	52	50	77	78	81	83	82	**79**
TOTAL	33,325	33,591	33,903	37,706	37,924	37,955	38,152	38,133	38,274	38,087	**37,502**

Cava around the world

5.

Sales in the domestic market and foreign market



FOREIGN MARKET THIRD COUNTRIES
64,797
THOUSANDS OF BOTTLES

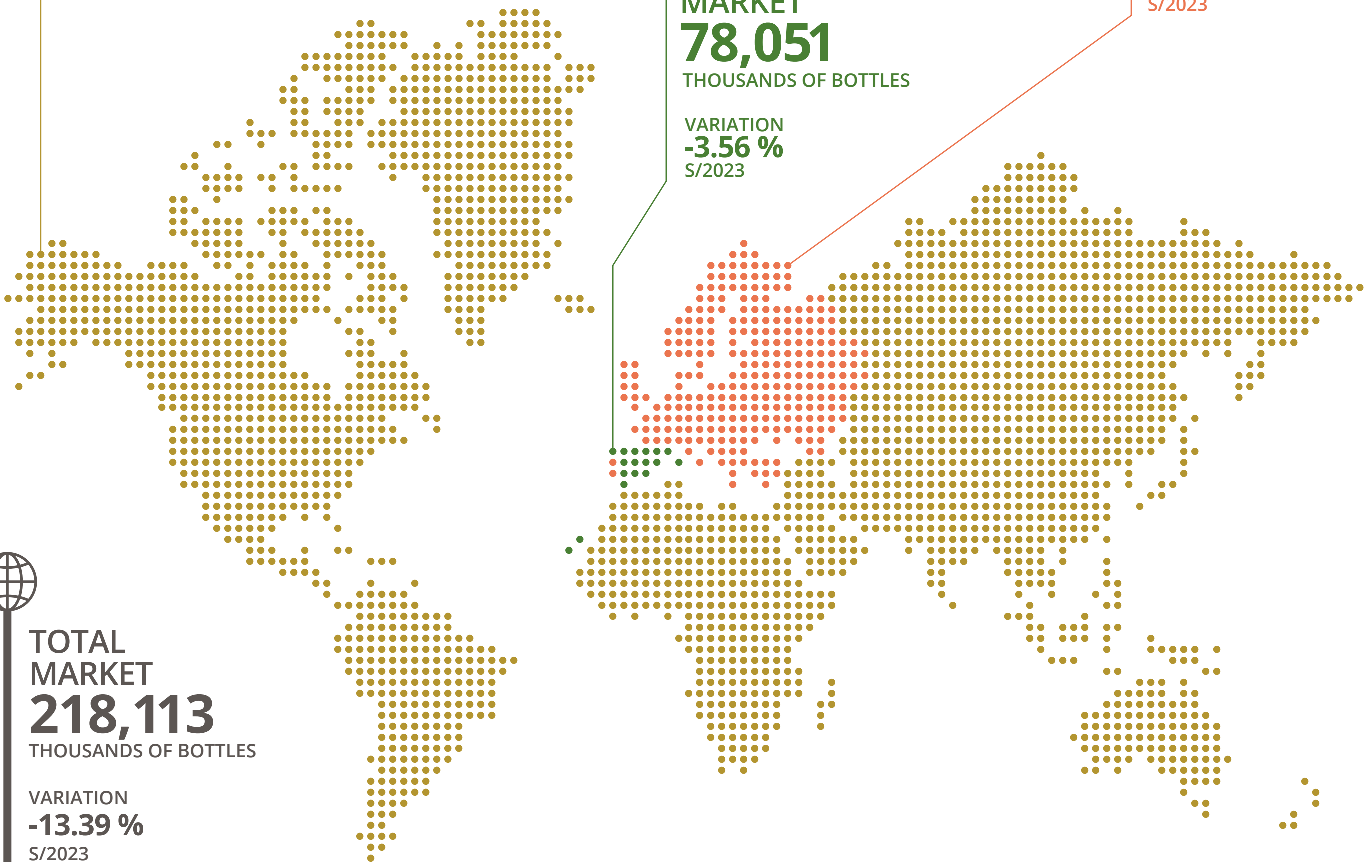
VARIATION
-10.89 %
S/2023

DOMESTIC MARKET
78,051
THOUSANDS OF BOTTLES

VARIATION
-3.56 %
S/2023

FOREIGN MARKET (EU)
75,265
THOUSANDS OF BOTTLES

VARIATION
-23.34 %
S/2023



TOTAL MARKET
218,113
THOUSANDS OF BOTTLES

VARIATION
-13.39 %
S/2023

Foreign Market countries

6.

Foreign market. Top 20 countries

RK 2024	COUNTRY	DIF. 2023	% CHANGE	THOUSANDS OF BOTTLES 2024	2023
1	BELGIUM	+1	-7.80 %	**20,357**	22,079
2	U.S.A.	+1	-4.58 %	**17,848**	18,704
3	U.K.	+1	-11.66 %	**15,725**	17,800
4	SWEDEN	+1	0.02 %	**12,531**	12,529
5	GERMANY	-4	-63.91 %	**11,235**	31,132
6	JAPAN	+1	4.66 %	**10,136**	9,685
7	FRANCE	-1	-4.08 %	**9,895**	10,316
8	NETHERLANDS	=	3.96 %	**8,658**	8,328
9	RUSSIA	=	-24.28 %	**4,883**	6,449
10	POLAND	+2	-7.03 %	**2,686**	2,889
11	BRAZIL	-1	-36.23 %	**2,128**	3,337
12	DENMARK	+2	-3.74 %	**1,700**	1,766
13	FINLAND	+2	-1.23 %	**1,682**	1,703
14	SWITZERLAND	-1	-40.89 %	**1,544**	2,612
15	UKRAINE	+1	12.28 %	**1,509**	1,344
16	CANADA	-5	-52.91 %	**1,466**	3,113
17	ESTONIA	+2	-0.17 %	**1,142**	1,144
18	MEXICO		31.92 %	**1,087**	824
19	NORWAY	-2	-17.82 %	**1,065**	1,296
20	LUXEMBOURG		2.66 %	**889**	866

Foreign market. Ranking top 50 countries

RK 2024	COUNTRY	% CHANGE	THOUSANDS OF BOTTLES
1	BELGIUM	-7.80 %	20,357
2	U.S.A.	-4.58 %	17,848
3	U.K.	-11.66 %	15,725
4	SWEDEN	0.02 %	12,531
5	GERMANY	-63.91 %	11,235
6	JAPAN	4.66 %	10,136
7	FRANCE	-4.08 %	9,895
8	NETHERLANDS	3.96 %	8,658
9	RUSSIA	-24.28 %	4,883
10	POLAND	-7.03 %	2,686
11	BRAZIL	-36.23 %	2,128
12	DENMARK	-3.74 %	1,700
13	FINLAND	-1.23 %	1,682
14	SWITZERLAND	-40.89 %	1,544
15	UKRAINE	12.28 %	1,509
16	CANADA	-52.91 %	1,466
17	ESTONIA	-0.17 %	1,142
18	MEXICO	31.89 %	1,087
19	NORWAY	-17.82 %	1,065
20	LUXEMBOURG	2.61 %	889
21	LITHUANIA	-21.13 %	763
22	SOUTH KOREA	27.10 %	753
23	AUSTRIA	-39.78 %	743
24	ISRAEL	-26.77 %	729
25	LATVIA	8.09 %	719

RK 2024	COUNTRY	% CHANGE	THOUSANDS OF BOTTLES
26	URUGUAY	8.76 %	512
27	ITALY	-37.62 %	477
28	CHINA	57.79 %	453
29	PUERTO RICO	34.26 %	428
30	PORTUGAL	-8.71 %	420
31	IRELAND	-10.80 %	387
32	CZECH R.	12.91 %	368
33	CROATIA	16.44 %	368
34	CUBA	67.39 %	345
35	AUSTRALIA	-1.99 %	298
36	CYPRUS	56.18 %	288
37	DOMINICAN R.	-26.19 %	276
38	PERU	4.37 %	207
39	COSTA RICA	36.12 %	191
40	BELARUS	52.41 %	184
41	BULGARIA	11.76 %	170
42	ROMANIA	52.59 %	169
43	CHILE	-35.19 %	141
44	ECUADOR	4.03 %	139
45	PANAMA	-25.64 %	135
46	U. ARAB E.	109.52 %	132
47	PARAGUAY	128.85 %	119
48	ICELAND	-5.17 %	110
49	ANDORRA	-0.75 %	109
50	HUNGARY	2.53 %	100

Sales by category

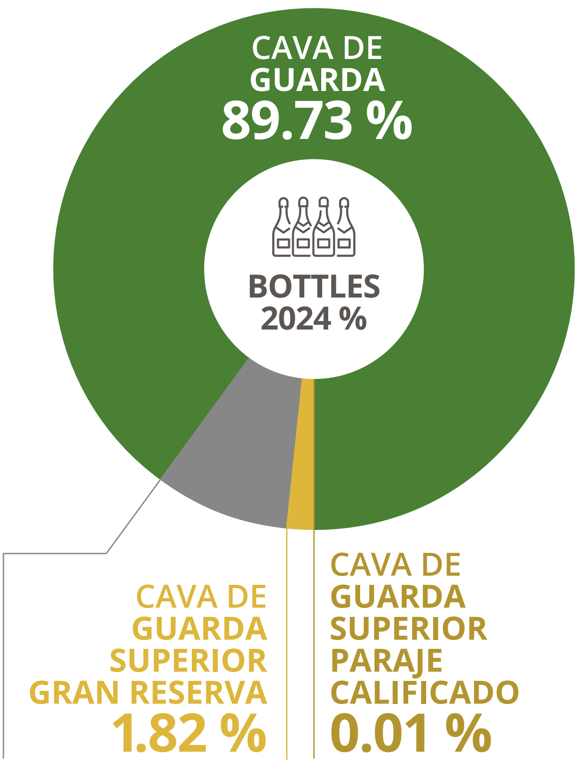
7.

Segmentation

AGING TIME

* GUARDA SUPERIOR:
100% organic / specific vineyards with at least 10 years old / Reference to year of harvest (Vintage)

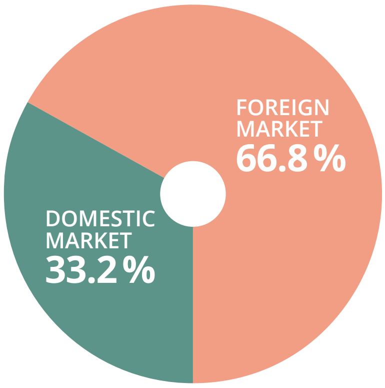
CATEGORIES	BOTTLES 2024	% EVOL. 2023–2024
Cava de Guarda	195,719,000	-12.79 %
Cava de Guarda Superior Reserva	18,404,000	-21.27 %
Cava de Guarda Superior Gran Reserva	3,973,000	-1.32 %
Cava de Paraje Calificado	17,000	13.33 %
TOTAL	218,113,000	-13.39 %



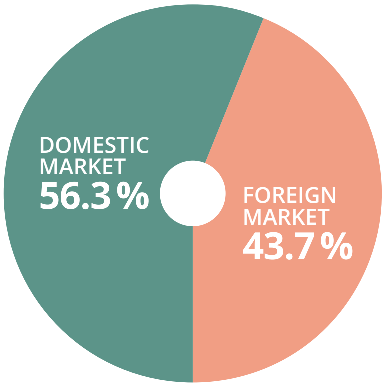
Segmentation by domestic market and foreign market

CATEGORIES		MARKET BOTTLES 2024	% EVOL. 2023–2024
CAVA DE GUARDA		**195,719,000**	**-12.79 %**
	DOMESTIC M.	64,941,000	-0.38 %
	FOREIGN M.	130,778,000	-17.87 %

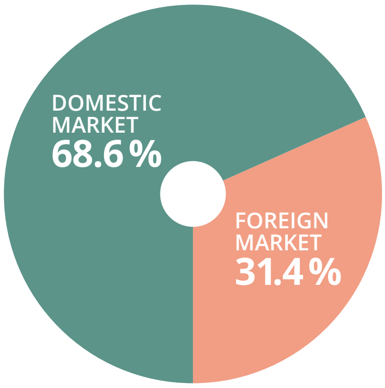
MARKET % 2024



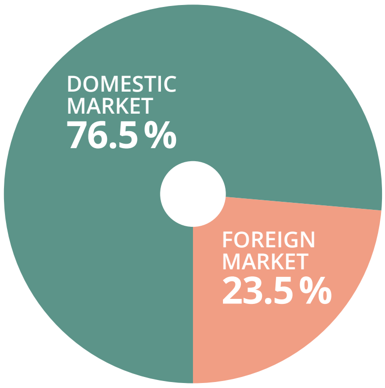
CATEGORIES		MARKET BOTTLES 2024	% EVOL. 2023–2024
CAVA DE GUARDA SUPERIOR RESERVA		**18,404,000**	**-21.27 %**
	DOMESTIC M.	10,370,000	-19.53 %
	FOREIGN M.	8,034,000	-23.41 %



CATEGORIES		MARKET BOTTLES 2024	% EVOL. 2023–2024
CAVA DE GUARDA SUPERIOR GRAN RESERVA		**3,973,000**	**-1.32 %**
	DOMESTIC M.	2,727,000	-4.45 %
	FOREIGN M.	1,246,000	6.31 %



CATEGORIES		MARKET BOTTLES 2024	% EVOL. 2023–2024
CAVA DE GUARDA SUPERIOR PARAJE CALIFICADO		**17,000**	**13.33 %**
	DOMESTIC M.	13,000	58.54 %
	FOREIGN M.	4,000	-41.18 %




D.O. CAVA
GUARDA SUPERIOR
VALLS D'ANOIA-FOIX
75cl
D.O. CAVA
GUARDA SUPERIOR
GRAN RESERVA
BRUT NATURE
Este Cava, meticulosamente seleccionado por un comité de expertos, es un fiel reflejo de un Cava de Guarda Superior: elaborado siguiendo el método tradicional y con una crianza mínima, en esta misma botella, de 30 meses en la quietud de las cavas.
De origen y trazabilidad garantizados por la D.O. Cava, tienes frente a ti un Cava de altísima calidad, de complejos matices, elegante y gastronómico.
PRODUCTO DE ESPAÑA
CONTIENE SULFITOS

Sales ranking by country

CAVA DE GUARDA

RK 2024	COUNTRY	THOUSANDS OF BOTTLES
1	BELGIUM	19,001
2	UNITED STATES	16,544
3	UNITED KINGDOM	15,181
4	SWEDEN	11,306
5	GERMANY	10,868
6	FRANCE	9,763
7	JAPAN	9,674
8	NETHERLANDS	7,786
9	RUSSIA	4,713
10	POLAND	2,562
11	BRAZIL	2,117
12	DENMARK	1,568
13	UKRAINE	1,441
14	FINLAND	1,407
15	SWITZERLAND	1,310
16	CANADA	1,183
17	ESTONIA	1,015
18	MEXICO	999
19	LUXEMBOURG	881
20	NORWAY	733
21	ISRAEL	725
22	AUSTRIA	725
23	LATVIA	660
24	LITHUANIA	659
25	SOUTH KOREA	646
26	URUGUAY	505
27	CHINA	446
28	ITALY	433
29	PUERTO RICO	408
30	PORTUGAL	380
31	CROATIA	362
32	IRELAND	349
33	CZECH REPUBLIC	335
34	CUBA	311
35	CYPRUS	288

CAVA DE GUARDA SUPERIOR RESERVA

RK 2024	COUNTRY	THOUSANDS OF BOTTLES
1	BELGIUM	1,259
2	SWEDEN	1,194
3	UNITED STATES	1,152
4	NETHERLANDS	815
5	UNITED KINGDOM	403
6	GERMANY	331
7	JAPAN	327
8	NORWAY	273
9	FINLAND	264
10	SWITZERLAND	213
11	RUSSIA	165
12	CANADA	138
13	FRANCE	131
14	ESTONIA	116
15	POLAND	114
16	DENMARK	111
17	SOUTH KOREA	85
18	MEXICO	77
19	LITHUANIA	76
20	PERU	63
21	TAIWAN	58
22	LATVIA	51
23	DOMINICAN REP.	47
24	ROMANIA	39
25	ITALY	37
26	IRELAND	36
27	UKRAINE	33
28	CUBA	31
29	CZECH REPUBLIC	29
30	PORTUGAL	27
31	ANDORRA	23
32	PUERTO RICO	18
33	COLOMBIA	17
34	HUNGARY	17
35	BULGARIA	17

CAVA DE GUARDA SUPERIOR GRAN RESERVA

RK 2024	COUNTRY	THOUSANDS OF BOTTLES
1	UNITED STATES	151
2	CANADA	145
3	UNITED KINGDOM	141
4	JAPAN	135
5	BELGIUM	96
6	NORWAY	60
7	NETHERLANDS	56
8	ROMANIA	35
9	GERMANY	35
10	UKRAINE	35
11	SWEDEN	32
12	LITHUANIA	28
13	DENMARK	22
14	SOUTH KOREA	22
15	SWITZERLAND	21
16	PERU	16
17	PORTUGAL	13
18	ANDORRA	13
19	ESTONIA	12
20	ICELAND	11
21	DOMINICAN REP.	11
22	MEXICO	11
23	FINLAND	11
24	POLAND	11
25	AUSTRIA	9
26	LATVIA	8
27	ITALY	7
28	COLOMBIA	5
29	RUSSIA	5
30	CZECH REPUBLIC	5
31	HUNGARY	4
32	PANAMA	4
33	LUXEMBOURG	4
34	BULGARIA	3
35	HONG KONG	3

CAVA DE GUARDA SUPERIOR PARAJE CALIFICADO

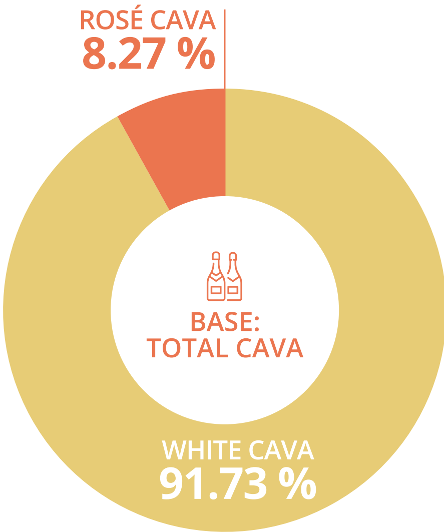
RK 2024	COUNTRY	TOTAL OF BOTTLES
1	COLOMBIA	576
2	ROMANIA	440
3	AUSTRIA	288
4	UNITED STATES	271
5	BELGIUM	259
6	POLAND	216
7	UKRAINE	180
8	RUSSIA	168
9	SWITZERLAND	165
10	FINLAND	148
11	CANADA	144
12	JAPAN	131
13	REP. SOUTH AFRICA	120
14	GERMANY	107
15	CHINA	91
16	UNITED KINGDOM	72
17	PORTUGAL	64
18	INDIA	60
19	TAIWAN	60
20	ANDORRA	56
21	KENYA	53
22	NETHERLANDS	52
23	GEORGIA	48
24	FRANCE	41
25	LUXEMBOURG	39
26	IRELAND	36
27	MEXICO	36
28	HUNGARY	29
29	ITALY	29
30	MOROCCO	26

Sales of Rosé Cava

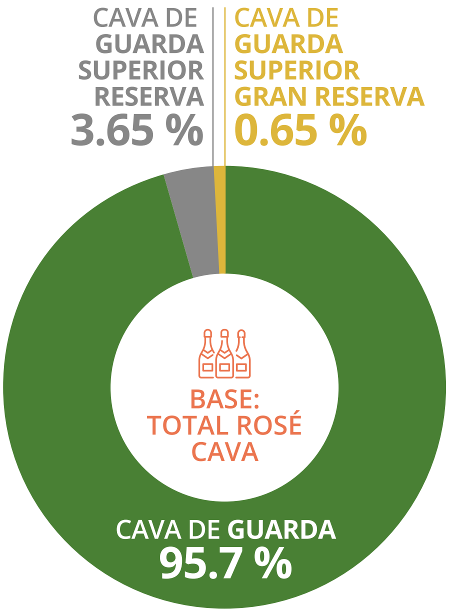
8.

Sales of Rosé Cava

WHITE CAVA VS. ROSÉ	THOUSANDS OF BOTTLES 2023	**2024**	% EVOL.
WHITE CAVA	228,340	**200,066**	-12.38 %
ROSÉ CAVA	23,499	**18,047**	-23.20 %
TOTAL	**251,839**	**218,113**	**-13.39 %**
% ROSÉ CAVA S/ TOTAL CAVA	9.33 %	**8.27 %**	



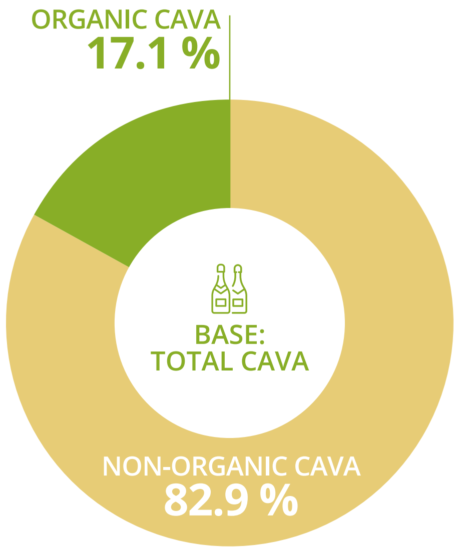
ROSÉ CAVA	THOUSANDS OF BOTTLES 2023	**2024**	% EVOL.
CAVA DE GUARDA	22,800	**17,271**	-24.25 %
CAVA DE GUARDA SUP. RESERVA	629	**659**	4.77 %
CAVA DE GUARDA SUP. GRAN RESERVA	68	**117**	72.06 %
TOTAL	**23,497**	**18,047**	**-23.19 %**
%CAVA DE GUARDA SUPERIOR ROSÉ OF TOTAL CAVA PRODUCED	2.97 %	**4.3 %**	



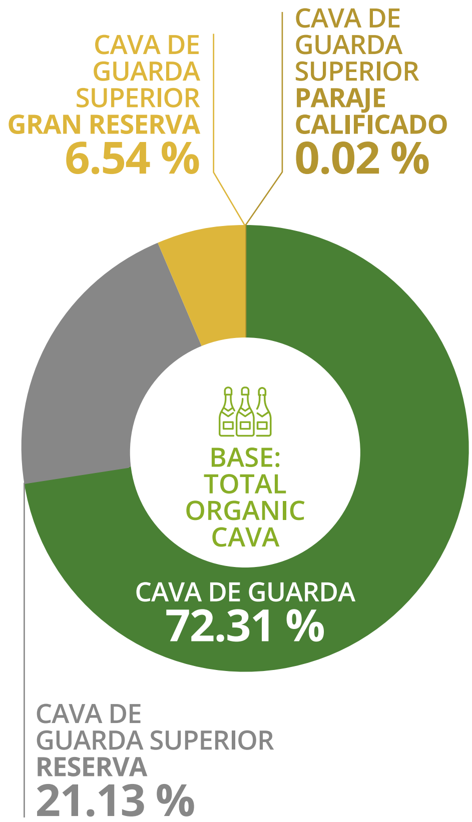
9. Sales of Organic Cava

Sales of organic Cava

NON-ORGANIC CAVA VS. ORGANIC CAVA	THOUSANDS OF BOTTLES 2024	% EVOL.
NON-ORGANIC CAVA	180,816	-17.61 %
ORGANIC CAVA	37,297	15.23 %
TOTAL	**218,113**	**-13.39 %**
% NON-ORGANIC CAVA VS. ORGANIC CAVA	17.1 %	



ORGANIC CAVA	THOUSANDS OF BOTTLES 2024	% EVOL.
CAVA DE GUARDA	26,968	17.34 %
CAVA DE GUARDA SUP. RESERVA	7,880	12.27 %
CAVA DE GUARDA SUP. GRAN RESERVA	2,440	3.52 %
CAVA DE GUARDA SUP. PARAJE CALIFICADO	8.9	15.58 %
TOTAL	**37,297**	**15.24 %**
% ORGANIC CAVA GUARDA SUPERIOR S/ TOTAL ORGANIC CAVA	27.69 %	

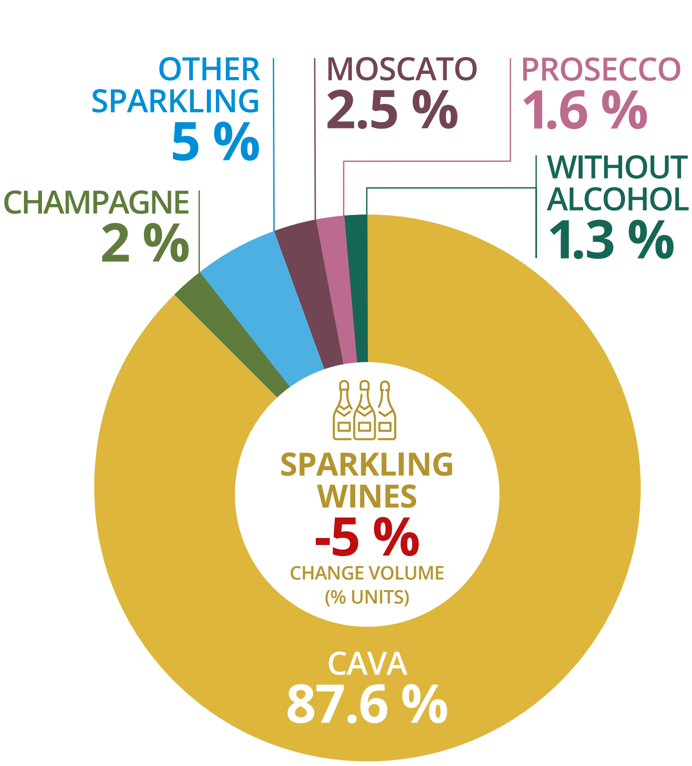


Domestic market consumption

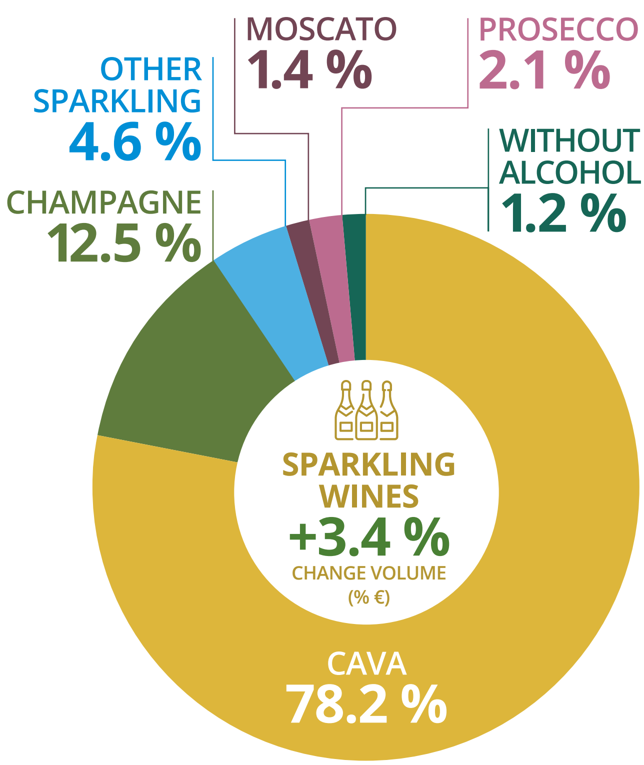
10.

Sparkling wines categories (by sub-categories)

VOLUME (% UNITS)



VALUE (% €)



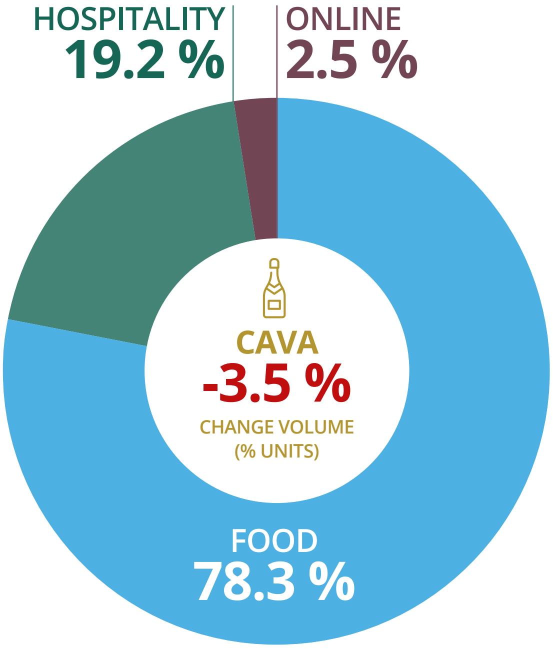
% CHANGE FROM PREVIOUS YEAR

CATEGORIES	VOLUME (% UNITS)	VALUE (% €)
TOTAL SPARKLING WINES	-5 %	3.4 %
CAVA	-4.8 %	4.1 %
CHAMPAGNE	-6 %	-2.2 %
OTHER SPARKLING	-11.5 %	0.8 %
MOSCATO	-17.2 %	-15.6 %
PROSECCO	0.6 %	17.2 %
WITHOUT ALCOHOL	38.8 %	49.9 %

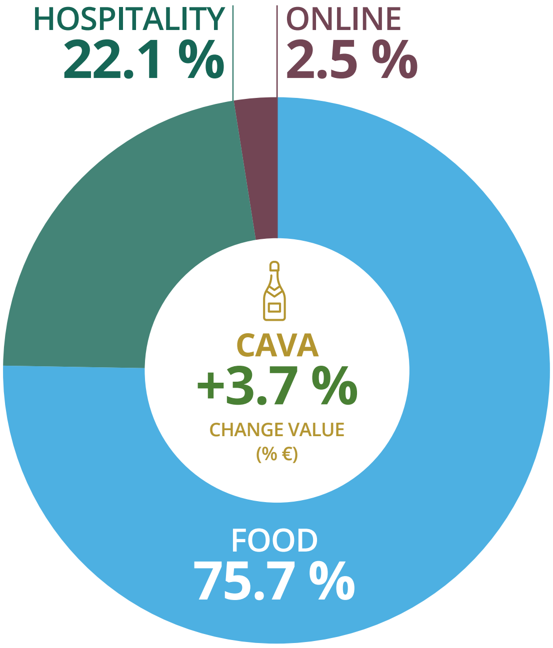
Circana. * Source: Circana. Data for total year ending January 2025.

Distribution and evolution of consumption by channel

VOLUME (% UNITS)



VALUE (% €)



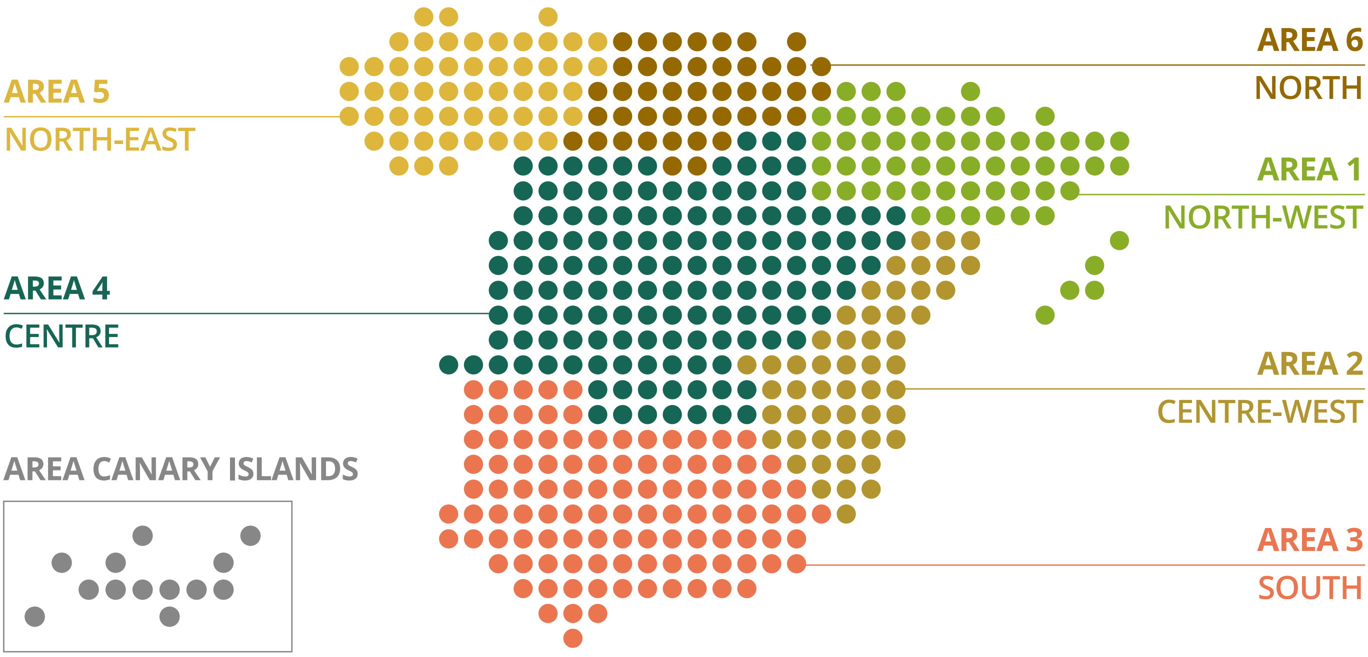
% CHANGE FROM PREVIOUS YEAR

CATEGORIES	VOLUME (% UNITS)	VALUE (% €)
TOTAL CAVA	-3.5 %	3.7 %
FOOD	-4.8 %	4.1 %
HOSPITALITY	-5.2 %	3.7 %
OFFLINE	13.5 %	15.4 %
ONLINE	1.9 %	2.5 %

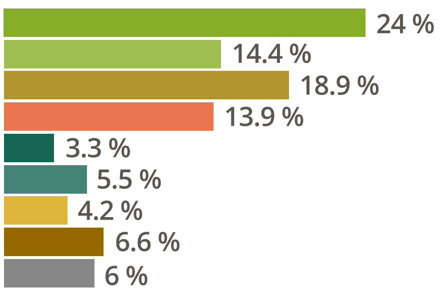
Circana. NielsenIQ

* Source: Circana and Nielsen IQ. Data for total year ending January 2025.
* The online channel includes sales from chains that sell online (not specialist wine websites).

Distribution of consumption by geographical area

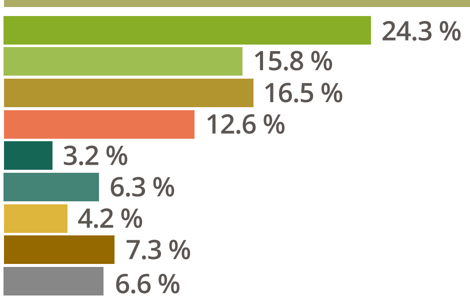


VOLUME (% UNITS)



CAVA **-5.2 %** VOLUME

VALUE (% €)



CAVA **+3.7 %** VALUE

GEOGRAPHICAL AREAS	VOLUME (% U.)	VALUE (% €)
1 NORTH-EAST	-5.8 %	0.8 %
BARCELONA M.A.	-7.5 %	0.9 %
2 CENTER–WEST	-2.7 %	7.7 %
3 SOUTH	-2.7 %	7.4 %
4 CENTER	-6.2 %	5.8 %
MADRID M.A.	-6.1 %	4.8 %
5 NORTH-WEST	-10.8 %	0.4 %
6 NORTH	-6.9 %	3.2 %
AREA CANARY ISLANDS	-3.5 %	6.5 %

Circana. * Source: Circana and Nielsen IQ. Data for total year ending January 2025.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