# CAVA

# 2019 GLOBAL REPORT

DENOMINACIÓN DE ORIGEN
CAVA

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## CONTENTS


CAVA

# 1. INTRODUCTION

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 FOREIGN MARKETS

The Foreign Market data corresponds to bottles sold abroad that are declared to the DO Cava Regulatory Board by associated wineries.

The DO Cava Regulatory Board does NOT have access to the sales figures for the domestic Market for associated wineries. For this reason, the data in the dossier that refers to the domestic Market does NOT correspond to sales.

To provide continuity to the information provided by the DO Cava Regulatory Board in previous years, figures for the domestic Market have been calculated in the following way:
*"Domestic" Market calculation = Total production - Foreign Market sales.*

DOMESTIC CONSUMPTION

Considering there are no figures for sales to the Domestic Market, the DO Cava Regulatory Board provides approximate information on sales, in the form of national Cava consumption.

National Cava consumption figures are provided by consultancy firm AC Nielsen, and correspond to the total Market (food and catering).

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

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This report is released annually in the year following the cut-off date for the previous calendar year's figures.



This document can be downloaded from the DO Cava website:
**www.docava.es/en/**

**@crcava** **@Cava.Do** **@DO_Cava** **DO_Cava**

#cavamoments

# 2. 2019 ANNUAL REPORT

Looking back at the previous financial year, we can see that 2019 has been a generally positive year, representing the second-best production figures in history, with the number of bottles of Cava produced globally at over 249 million, representing an increase of 2.07% on the previous year.

Sales to foreign Markets dropped an almost imperceptible 0.03%, almost exactly as same as the previous year and represented a record level of exports, maintaining Cava's presence in international Markets with over 165 million bottles produced for international destinations.

The result is that DO Cava continues to be the leader in Spain in terms of export volumes. This consolidates Cava's international profile, with two thirds of its production destined for Foreign Markets. In addition, we can see how Cava's popularity has increased in emerging Markets like Japan (+27.41%), Sweden (+30.03%), Russia (+29.94%) and Poland (+49.79%), with significant two-digit growth, and has maintained slightly decreasing figures in historically more established Markets like Germany, Belgium and the United States.

On the Domestic Market, according to authoritative source AC Nielsen, it is clear that although during 2019 the consumption by value of CAVA slightly decreased (-0.5%) with respect to the previous year, it is less negative than the change in volume (-1.3%) as the trend for consuming higher priced Cava continues.

On the other hand, it should be noted that the Organic Cava category continued to enjoy a dramatic increase in production in 2019 (+31.51%), revealing the consumer's continued interest in environmentally-friendly products. The previous year also saw significant growth in Rosé Cava (+10.8%) giving this category a strategic role and ensuring it is on trend.

In summary, 2019 has been a good year in terms of shippment figures for DO Cava, the second-best year in the DO's history both in general production of bottles and for exports.

However, we cannot evaluate 2019 for Cava without taking into account that it was the year when the Strategic Plan was approved and actively implemented. The Plan is designed to deal with future challenges facing the sector and consolidate and expand its position as one of the most important and well-recognised Designation of Origin in the world.

Accordingly, 2019 began with the launch of a plan to reinforce the Designation's quality control mechanisms to ensure improvement and greater recognition of the guarantee of maximum quality that the DO represents.

It should also be noted that 2019 ended with the Plenary approving the DO Cava segmentation and zoning project. The project will focus on improvements for the consumer in terms of information and traceability criteria for this high-quality product. It will also enhance the standing of the only Spanish Designation of Origin that specialises in high-quality sparkling wines, produced using the traditional method of bottle ageing, and with new production specifications. All this is based on dedication and commitment to origin, territory, and sustainability.

In 2019, we have continued working to promote Cava, raise its profile within Spain and internationally, and de-seasonalise Cava consumption to position it as the ideal option to accompany and enhance any dish, both on special occasions and for every day. The main aim of promoting Cava has been to demonstrate that it is a gourmet drink, one that is versatile, delicious, and healthy when consumed in moderation.

DO Cava assumes its responsibility as the protector of a territory, a landscape, and an economic sector. The DO Cava Regulatory Board will therefore continue to support all initiatives aimed at reducing the impact of our activity on the environment, as well as helping the sector be sustainable.

Our search for excellence must go hand-in-hand with respect for the land and the legacy that will be transmitted to the next generations.

**Javier Pagés Font**
President of the PDO DO Cava DO Cava Regulatory Board

# 3. REGISTRATIONS

## 3.1 Winegrowing operations

*Number of operators 2019*

**6,582**

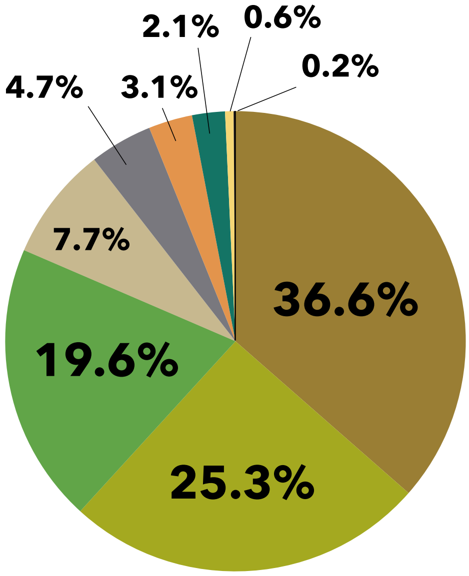
*Registered surface area (ha) 2019*

**37,955 Hectares**

| YEAR | NUMBER OF OPERATORS | % change | REGISTERED SURFACE AREA (HA) | % change |
|---|---|---|---|---|
| 2019 | 6,582 | -1.0% | 37,955 | 0.1% |
| 2018 | 6,647 | -0.3% | 37,924 | 0.6% |
| 2017 | 6,668 | 4.6% | 37,706 | 11.2% |
| 2016 | 6,374 | 0.4% | 33,903 | 0.9% |
| 2015 | 6,350 | 0.2% | 33,591 | 0.8% |
| 2014 | 6,335 | -0.5% | 33,325 | 1.3% |
| 2013 | 6,365 | -3.0% | 32,913 | 1.7% |
| 2012 | 6,561 | -0.7% | 32,355 | 1.9% |
| 2011 | 6,610 | -1.1% | 31,765 | 3.6% |
| 2010 | 6,686 | 8.7% | 30,654 | -1.3% |
| 2009 | 6,149 | | 31,061 | |

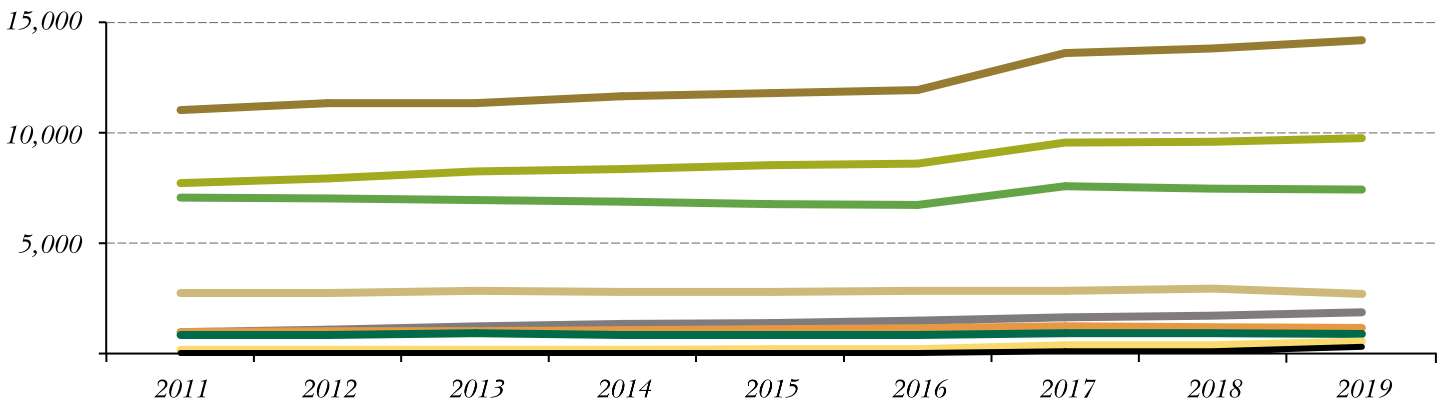
# 3. REGISTRATIONS

## 3.2 Registered surface area by variety




| | 2019 (Ha) |
|---|---|
| MACABEU | *13,909* |
| XAREL·LO | *9,603* |
| PARELLADA | *7,451* |
| CHARDONNAY | *2,935* |
| GARNATXA NEGRA | *1,776* |
| TREPAT | *1,164* |
| PINOT NOIR | *808* |
| SUBIRAT PARENT | *232* |
| MONASTRELL | *77* |
| *TOTAL* | ***37,955*** |

** In Hectares.*




| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|---|---|---|
| MACABEU | *11,095* | *11,390* | *11,420* | *11,718* | *11,847* | *11,996* | *13,639* | *13,828* | *13,909* |
| XAREL·LO | *7,769* | *7,971* | *8,293* | *8,392* | *8,566* | *8,626* | *9,558* | *9,599* | *9,603* |
| PARELLADA | *7,086* | *7,044* | *6,994* | *6,931* | *6,816* | *6,772* | *7,563* | *7,472* | *7,451* |
| CHARDONNAY | *2,899* | *2,903* | *2,971* | *2,925* | *2,926* | *2,965* | *2,989* | *3,036* | *2,935* |
| GARNATXA NEGRA | *984* | *1,076* | *1,237* | *1,346* | *1,377* | *1,453* | *1,616* | *1,673* | *1,776* |
| TREPAT | *990* | *1,004* | *1,013* | *1,057* | *1,103* | *1,109* | *1,179* | *1,168* | *1,164* |
| PINOT NOIR | *839* | *866* | *883* | *848* | *837* | *853* | *875* | *873* | *808* |
| SUBIRAT PARENT | *74* | *73* | *73* | *72* | *78* | *88* | *235* | *225* | *232* |
| MONASTRELL | *29* | *28* | *30* | *36* | *41* | *41* | *52* | *50* | *77* |
| *TOTAL* | ***31,765*** | ***32,355*** | ***32,914*** | ***33,325*** | ***33,591*** | ***33,903*** | ***37,706*** | ***37,924*** | ***37,955*** |

** In Hectares.*

# 3. REGISTRATIONS

## 3.3 Producers

*Number of Cava producers 2019*

**214**

*Number of Base Wine producers 2019*

**143**

| YEAR | NUMBER OF CAVA PRODUCERS | % change | NUMBER OF BASE WINE PRODUCERS | % change |
|---|---|---|---|---|
| 2019 | 214 | -4.5% | 143 | -1.4% |
| 2018 | 224 | -2.6% | 145 | -8.2% |
| 2017 | 230 | -2.1% | 158 | -2.5% |
| 2016 | 235 | -2.5% | 162 | 2.5% |
| 2015 | 241 | -1.2% | 158 | -0.6% |
| 2014 | 244 | -1.2% | 159 | -1.9% |
| 2013 | 247 | -2.4% | 162 | -0.6% |
| 2012 | 253 | -0.4% | 163 | -1.2% |
| 2011 | 254 | -0.8% | 165 | 0.6% |
| 2010 | 256 | -3.8% | 164 | 0.0% |
| 2009 | 266 | -2.2% | 164 | 0.0% |

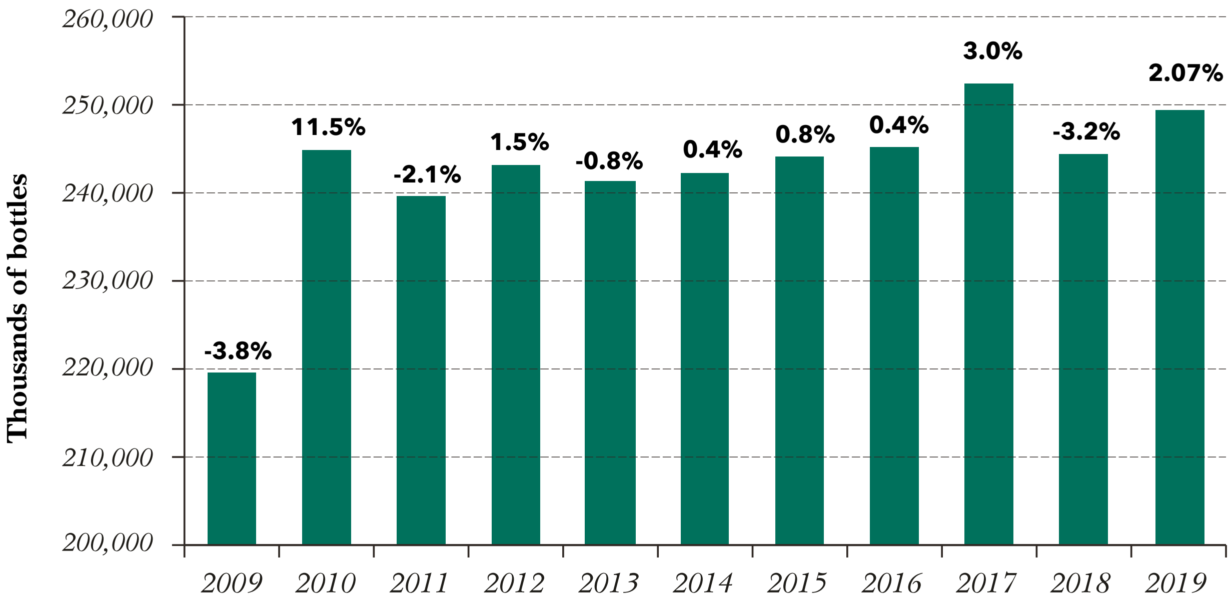
# 4. SHIPMENTS

*Total production 2019*

**249,544,696**
**BOTTLES**

*Variation Previous year*

**2.07%**

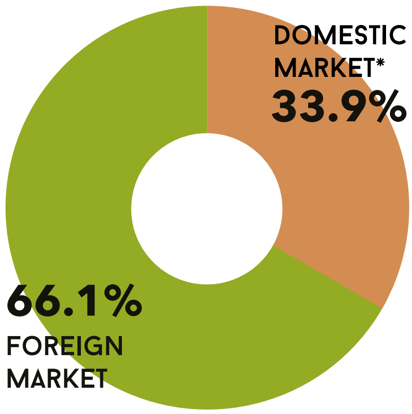



| 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|---|---|---|---|
| 219,463 | 244,801 | 239,555 | 243,232 | 241,365 | 242,288 | 244,123 | 245,156 | 252,512 | 244,472 | 249,544 |

** In thousands of bottles.*

# 5. CAVA AROUND THE WORLD

## 5.1 Domestic Market* and Foreign Market




| Total Domestic Market* 2018 | Total Domestic Market* 2019 | % change |
|---|---|---|
| 79,383 | 84,508 | 6.46% |

| Total Foreign Market 2018 | Total Foreign Market 2019 | % change |
|---|---|---|
| 165,089 | 165,036 | -0.03% |

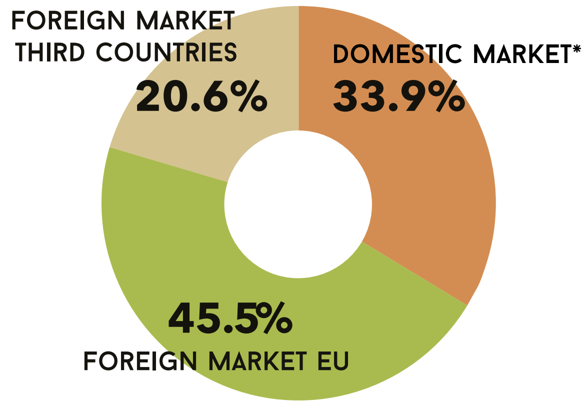
| Total Market 2018 | Total Market 2019 | % change |
|---|---|---|
| 244,472 | 249,544 | 2.07% |

** In thousands of bottles.*

** Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

# 5. CAVA AROUND THE WORLD

## 5.2 Domestic Market *and Foreign Market third countries




| *Domestic Market* 2018* | *Domestic Market* 2019* | *% change* |
|---|---|---|
| **79,383** | **84,508** | **6.46%** |

| *Foreign Market: EU 2018* | *Foreign Market: EU 2019* | *% change* |
|---|---|---|
| **115,170** | **113,595** | **-1.37%** |

| *Foreign Market: Third countries 2018* | *Foreign Market: Third countries 2019* | *% change* |
|---|---|---|
| **49,919** | **51,441** | **3.05%** |

| *Total Market 2018* | *Total Market 2019* | *% change* |
|---|---|---|
| **244,472** | **249,544** | **2.07%** |

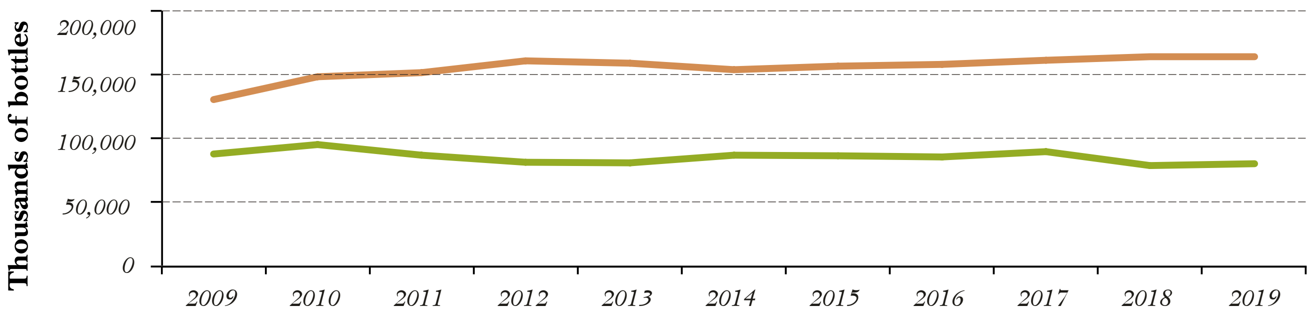
** In thousands of bottles.*

** Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

# 5. CAVA AROUND THE WORLD

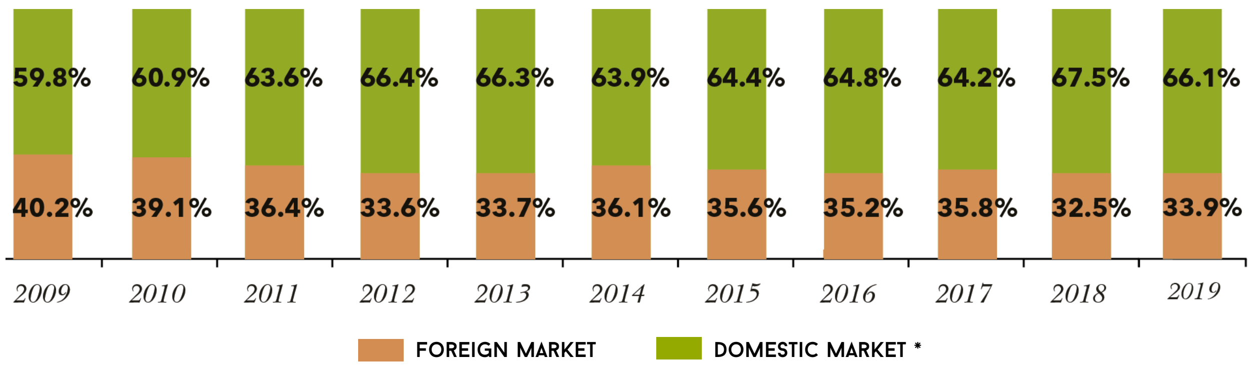
## 5.3 Evolution of Cava production since 2009

### by Domestic Market* and Foreign Market




| YEAR | DOMESTIC MARKET* | % change/ prev. year | FOREIGN MARKET* | % change/ prev. year |
|---|---|---|---|---|
| 2019 | 84,508 | 6.46% | 165,036 | -0.03% |
| 2018 | 79,384 | -12.1% | 165,088 | 1.8% |
| 2017 | 90,289 | 4.8% | 162,223 | 2.0% |
| 2016 | 86,183 | -0.8% | 158,973 | 1.1% |
| 2015 | 86,876 | -0.8% | 157,247 | 1.6% |
| 2014 | 87,580 | 7.5% | 154,708 | -3.3% |
| 2013 | 81,438 | -0.5% | 159,927 | -0.9% |
| 2012 | 81,825 | -6.3% | 161,407 | 6.0% |
| 2011 | 87,309 | -8.7% | 152,246 | 2.1% |
| 2010 | 95,641 | 8.4% | 149,160 | 13.7% |
| 2009 | 88,253 | -1.0% | 131,210 | -5.5% |

** In thousands of bottles.*




** Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

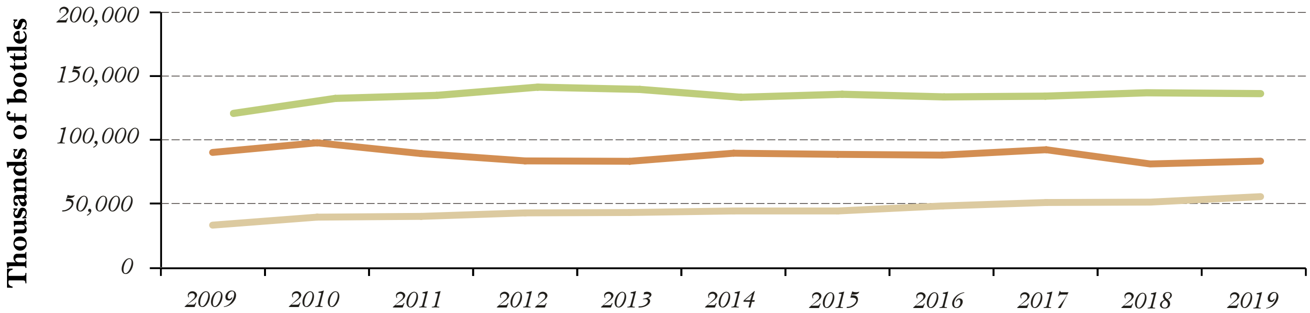
## 5. CAVA AROUND THE WORLD

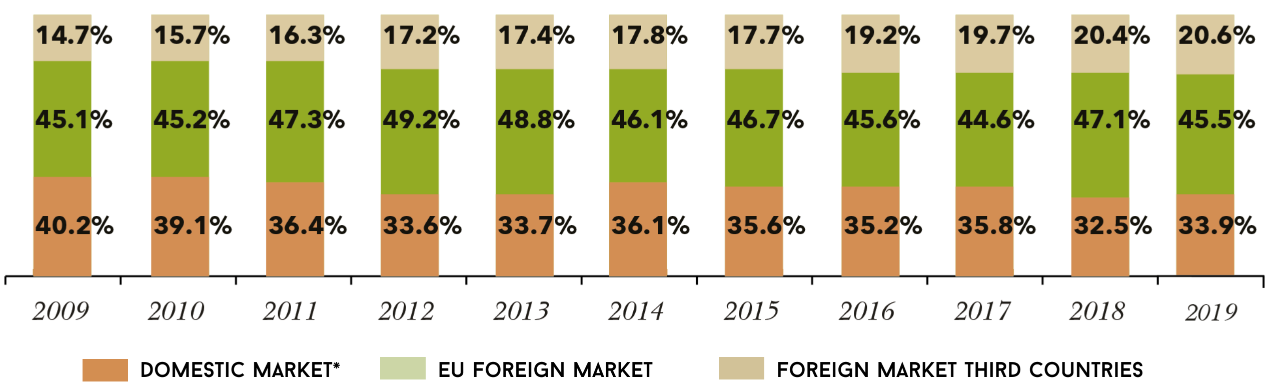
### 5.4 Evolution of Cava shipments since 2009

**by Domestic Market*, EU Foreign Market and Foreign Market third countries**

| YEAR | DOMESTIC MARKET* | % change/ from prev. year | FOREIGN MARKET EU | % change/ from prev. year | FOREIGN MARKET THIRD COUNTRIES | % change/ from prev. year |
|---|---|---|---|---|---|---|
| 2019 | 84,508 | 6.46% | 113,595 | -1.37% | 51,441 | 3.05% |
| 2018 | 79,384 | -12.1% | 115,170 | 2.3% | 49,918 | 0.6% |
| 2017 | 90,289 | 4.8% | 112,597 | 0.7% | 49,626 | 5.2% |
| 2016 | 86,183 | -0.8% | 111,796 | -1.9% | 47,177 | 9.1% |
| 2015 | 86,876 | -0.8% | 114,011 | 2.1% | 43,236 | 0.3% |
| 2014 | 87,580 | 7.5% | 111,620 | -5.3% | 43,088 | 2.4% |
| 2013 | 81,438 | -0.5% | 117,836 | -1.5% | 42,091 | 0.8% |
| 2012 | 81,825 | -6.3% | 119,666 | 5.7% | 41,741 | 7.0% |
| 2011 | 87,309 | -8.7% | 113,219 | 2.3% | 39,027 | 1.3% |
| 2010 | 95,641 | 8.4% | 110,649 | 11.9% | 38,511 | 19.1% |
| 2009 | 88,253 | -1.0% | 98,880 | -7.2% | 32,330 | -0.2% |

** In thousands of bottles.*






** Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

# 6. FOREIGN MARKET COUNTRIES

## 6.1 Foreign Market. Top 20 countries.

| RK 2019 | COUNTRY | Dif. Ranking | % change | THOUSANDS OF BOTTLES 2019 | 2018 |
|---|---|---|---|---|---|
| 1 | Germany | = | -4.6% | 30,604 | 32,110 |
| 2 | Belgium | = | -0.4% | 27,107 | 27,229 |
| 3 | United States | = | -8.3% | 19,899 | 21,714 |
| 4 | United Kingdom | = | -10.2% | 19,450 | 21,675 |
| 5 | Japan | +1 | 27.4% | 10,708 | 8,405 |
| 6 | France | -1 | 1.7% | 10,678 | 10,496 |
| 7 | Sweden | = | 30.0% | 6,760 | 5,199 |
| 8 | Netherlands | = | 10.4% | 5,557 | 5,034 |
| 9 | Russia | +3 | 29.9% | 3,355 | 2,583 |
| 10 | Canada | = | -0.02% | 3,049 | 3,048 |
| 11 | Finland | -2 | -9.7% | 3,001 | 3,326 |
| 12 | Switzerland | -1 | 1.8% | 2,649 | 2,599 |
| 13 | Poland | +2 | 49.7% | 2,293 | 1,531 |
| 14 | Denmark | -1 | 5.0% | 2,214 | 2,108 |
| 15 | Norway | -1 | 7.3% | 1,842 | 1,716 |
| 16 | Austria | +2 | 0.1% | 1,078 | 1,080 |
| 17 | Brazil | -1 | -21.7% | 1,072 | 1,370 |
| 18 | Lithuania | -1 | -28.2% | 980 | 1,366 |
| 19 | Estonia | = | -13.3% | 897 | 1,034 |
| 20 | Israel | +2 | 27.6% | 860 | 674 |

# 6. FOREIGN MARKET COUNTRIES

## 6.2 Foreign Market. Ranking Top 50 countries.

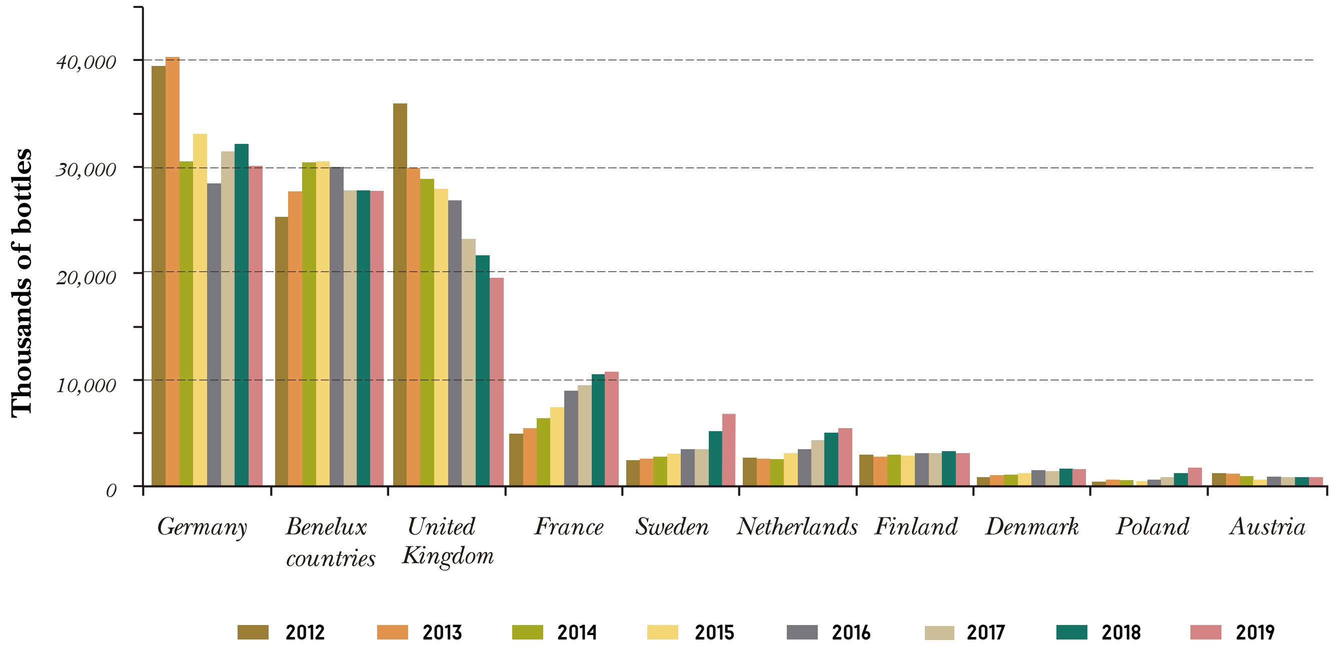
| RK 2019 | COUNTRY | BOTTLES | % change |
|---|---|---|---|
| 1 | Germany | 30,604 | -4.6% |
| 2 | Belgium | 27,107 | -0.4% |
| 3 | United States | 19,899 | -8.3% |
| 4 | United Kingdom | 19,450 | -10.2% |
| 5 | Japan | 10,708 | 27.4% |
| 6 | France | 10,678 | 1.7% |
| 7 | Sweden | 6,760 | 30.0% |
| 8 | Netherlands | 5,557 | 10.4% |
| 9 | Russia | 3,355 | 29.9% |
| 10 | Canada | 3,049 | 0.02% |
| 11 | Finland | 3,001 | -9.7% |
| 12 | Switzerland | 2,649 | 1.8% |
| 13 | Poland | 2,293 | 49.7% |
| 14 | Denmark | 2,214 | 5.0% |
| 15 | Norway | 1,842 | 7.3% |
| 16 | Austria | 1,078 | 0.1% |
| 17 | Brazil | 1,072 | -21.7% |
| 18 | Lithuania | 980 | -28.2% |
| 19 | Estonia | 897 | -13.3% |
| 20 | Israel | 860 | 27.6% |
| 21 | Latvia | 766 | 8.9% |
| 22 | Ukraine | 731 | 68.4% |
| 23 | Australia | 722 | 19.4% |
| 24 | South Korea | 605 | 10.5% |
| 25 | Dominican Rep. | 583 | 8.7% |

* In thousands of bottles.

| RK 2019 | COUNTRY | BOTTLES | % change |
|---|---|---|---|
| 26 | Luxembourg | 504 | -2.6% |
| 27 | Uruguay | 411 | -42.1% |
| 28 | Mexico | 403 | -25.8% |
| 29 | China | 400 | 12.3% |
| 30 | Portugal | 357 | -5.0% |
| 31 | Italy | 317 | 27.8% |
| 32 | Peru | 270 | 3.5% |
| 33 | Czech Republic | 247 | -48.1% |
| 34 | Nigeria | 231 | 39.8% |
| 35 | Panama | 229 | -20.3% |
| 36 | Ireland | 218 | -21,6% |
| 37 | Qatar | 204 | 437% |
| 38 | Chile | 201 | -2.7% |
| 39 | Slovakia | 198 | 797% |
| 40 | Hong Kong | 187 | 8.3% |
| 41 | Belarus | 185 | 88.3% |
| 42 | Ecuador | 178 | -9.9% |
| 43 | Andorra | 174 | -31.9% |
| 44 | Paraguay | 171 | -33.4% |
| 45 | Colombia | 144 | -2.8% |
| 46 | Slovenia | 143 | -6.8% |
| 47 | Iceland | 133 | 15.2% |
| 48 | New Zealand | 95 | -8.6% |
| 49 | Taiwan | 89 | -18.6% |
| 50 | Costa Rica | 84 | 14.9% |

# 7. EUROPEAN UNION COUNTRIES

## 7.1 Historical ranking by Top 10 countries

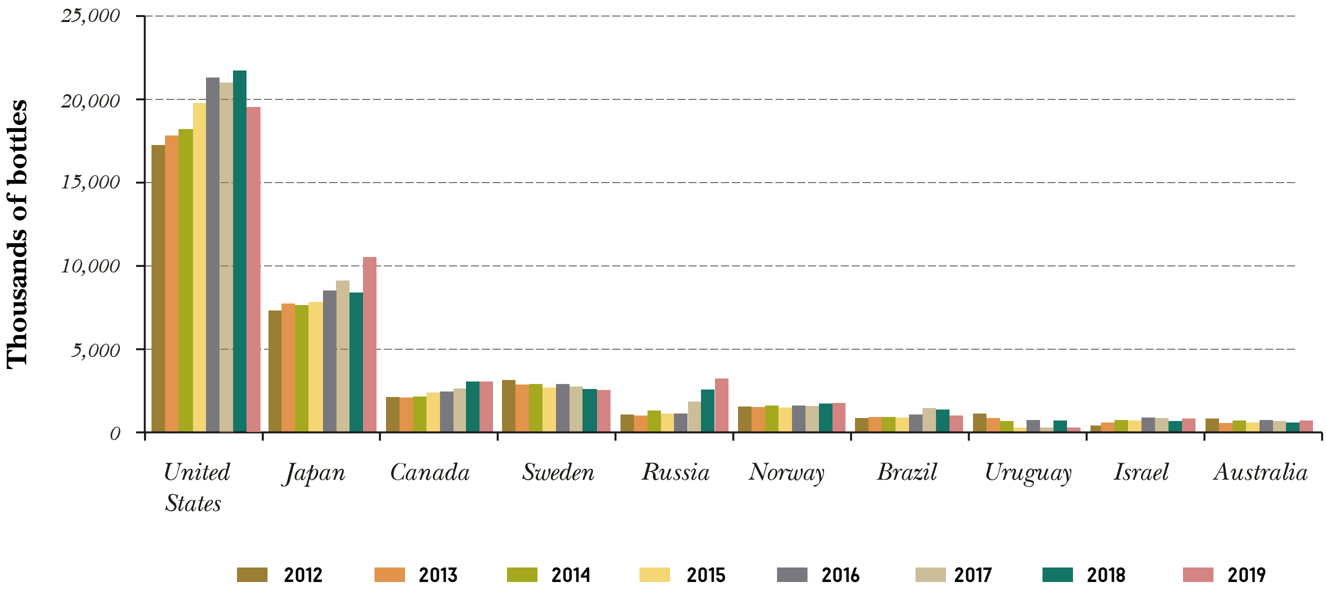



| | COUNTRY | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Germany | 39,461 | 40,289 | 30,546 | 33,079 | 28,417 | 31,419 | 32,110 | 30,604 |
| 2 | Benelux countries | 25,269 | 27,644 | 30,405 | 30,510 | 30,016 | 29,099 | 27,736 | 27,611 |
| 3 | United Kingdom | 35,926 | 29,904 | 28,833 | 27,902 | 26,822 | 23,167 | 21,675 | 19,450 |
| 4 | France | 4,961 | 5,444 | 6,364 | 7,430 | 8,972 | 9,463 | 10,496 | 10,678 |
| 5 | Sweden | 2,443 | 2,592 | 2,789 | 3,016 | 3,440 | 4,198 | 5,199 | 6,760 |
| 6 | Netherlands | 2,673 | 2,593 | 2,558 | 3,124 | 3,484 | 4,338 | 5,034 | 5,557 |
| 7 | Finland | 2,912 | 2,750 | 2,918 | 2,888 | 3,140 | 3,077 | 3,326 | 3,001 |
| 8 | Denmark | 1,054 | 1,294 | 1,424 | 1,572 | 1,914 | 1,847 | 2,108 | 2,214 |
| 9 | Poland | 523 | 756 | 715 | 621 | 769 | 1,056 | 1,531 | 2,293 |
| 10 | Austria | 1,533 | 1,482 | 1,203 | 789 | 1,101 | 1,061 | 1,080 | 1,078 |

** In thousands of bottles.*

# 8. THIRD COUNTRIES

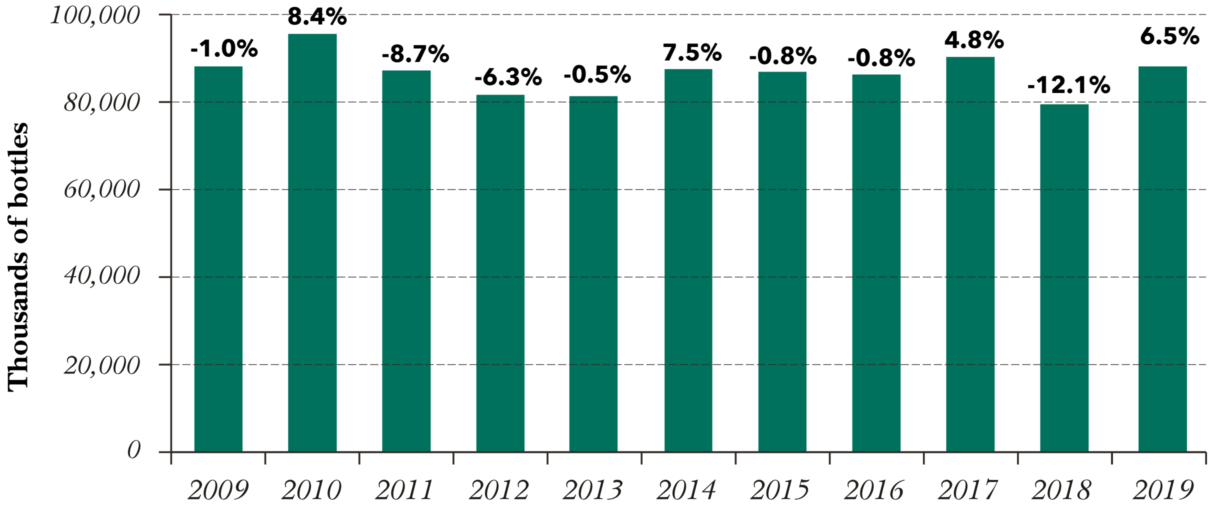
## 8.1 Historical ranking by Top 10 countries




| | COUNTRY | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | United States | 17,224 | 17,845 | 18,224 | 19,790 | 21,304 | 21,039 | 21,714 | 19,899 |
| 2 | Japan | 7,326 | 7,727 | 7,662 | 7,826 | 8,505 | 9,122 | 8,405 | 10,708 |
| 3 | Russia | 1,057 | 988 | 1,285 | 1,113 | 1,121 | 2,018 | 2,583 | 3,355 |
| 4 | Canada | 2,132 | 2,079 | 2,160 | 2,380 | 2,448 | 2,763 | 3,048 | 3,049 |
| 5 | Switzerland | 3,133 | 2,870 | 2,895 | 2,686 | 2,921 | 2,880 | 2,599 | 2,649 |
| 6 | Norway | 1,566 | 1,523 | 1,605 | 1,484 | 1,616 | 1,687 | 1,716 | 1,842 |
| 7 | Brazil | 858 | 917 | 931 | 882 | 1,089 | 1,496 | 1,370 | 1,072 |
| 8 | Israel | 390 | 592 | 735 | 691 | 872 | 889 | 674 | 860 |
| 9 | Ukraine | 59 | 91 | 142 | 97 | 188 | 385 | 433 | 731 |
| 10 | Australia | 829 | 561 | 699 | 585 | 735 | 629 | 604 | 722 |

** In thousands of bottles.*

# 9. DOMESTIC MARKET*

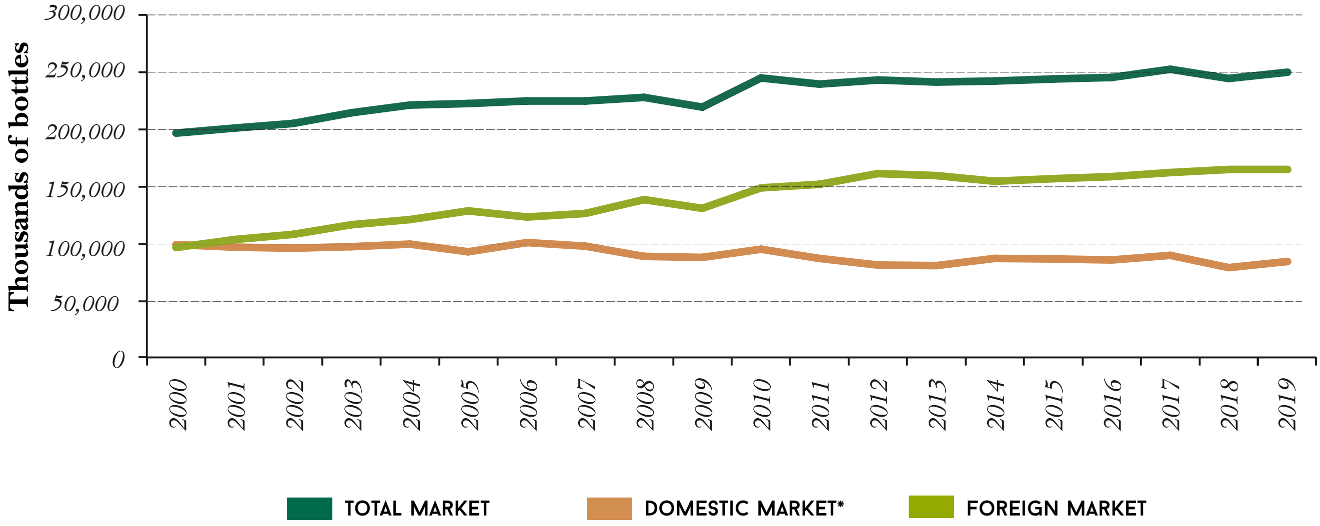



| 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|---|---|---|---|
| 88,253 | 95,641 | 87,309 | 81,825 | 81,438 | 87,580 | 86,876 | 86,183 | 90,289 | 79,384 | 84,508 |

** In thousands of bottles.*

** Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

# 10. HISTORIC SHIPMENT DATA



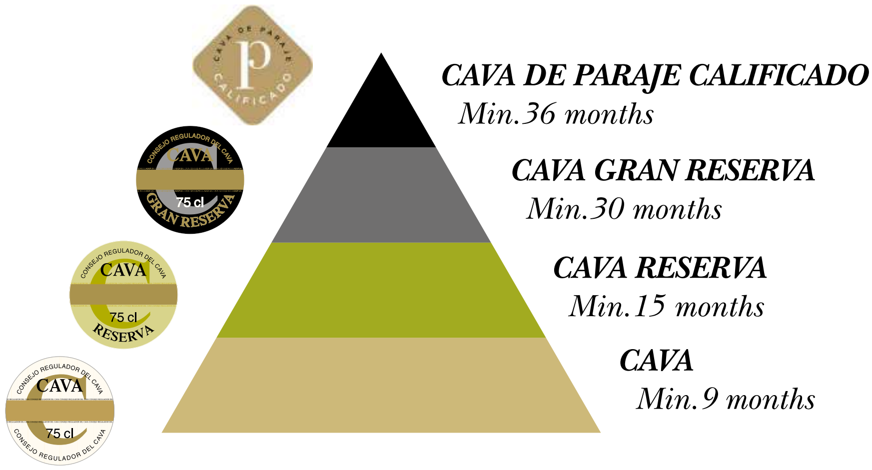

| YEAR | TOTAL MARKET | DOMESTIC MARKET* | FOREIGN MARKET |
|---|---|---|---|
| 1900 | 200 | | |
| 1910 | 400 | | |
| 1920 | 1,000 | | |
| 1930 | 2,400 | | |
| 1940 | 2,400 | | |
| 1950 | 5,700 | | |
| 1960 | 10,500 | | |
| 1970 | 47,000 | | |
| 1980 | 82,048 | 72,000 | 10,048 |
| 1990 | 139,726 | 92,500 | 47,226 |
| 2000 | 196,751 | 99,732 | 97,019 |
| 2001 | 201,217 | 97,368 | 103,849 |
| 2002 | 205,089 | 96,646 | 108,443 |
| 2003 | 214,648 | 97,816 | 116,832 |
| 2004 | 221,378 | 100,103 | 121,275 |
| 2005 | 222,402 | 93,501 | 128,901 |
| 2006 | 224,908 | 101,336 | 123,573 |
| 2007 | 224,950 | 98,167 | 126,783 |
| 2008 | 228,050 | 89,130 | 138,920 |
| 2009 | 219,463 | 88,253 | 131,210 |
| 2010 | 244,801 | 95,641 | 149,160 |
| 2011 | 239,555 | 87,309 | 152,246 |
| 2012 | 243,232 | 81,825 | 161,407 |
| 2013 | 241,365 | 81,438 | 159,927 |
| 2014 | 242,288 | 87,580 | 154,708 |
| 2015 | 244,123 | 86,876 | 157,247 |
| 2016 | 245,156 | 86,183 | 158,973 |
| 2017 | 252,512 | 90,289 | 162,223 |
| 2018 | 244,472 | 79,384 | 165,088 |
| 2019 | 249,544 | 84,508 | 165,036 |

** In thousands of bottles.*

** Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

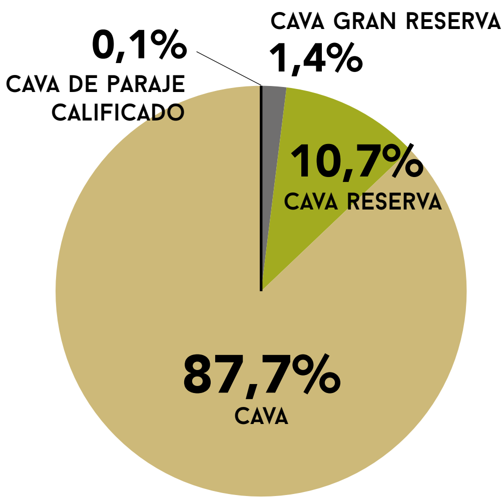
# 11. COMMERCIALIZATION BY CATEGORY

## 11.1 Segmentation




| | 2018 | 2019 | % |
|---|---|---|---|
| *CAVA DE PARAJE CALIFICADO Min.36 months* | *130,667* | *27,341* | *0.01%* |
| *CAVA GRAN RESERVA Min.30 months* | *4,700,650* | *3,619,281* | *1.45%* |
| *CAVA RESERVA Min.15 months* | *26,681,255* | *26,841,209* | *10.7%* |
| *CAVA Min.9 months* | *212,959,767* | *219,056,865* | *87.7%* |
| *TOTAL* | *244,472,340* | *249,544,696* | |

** In bottles.*

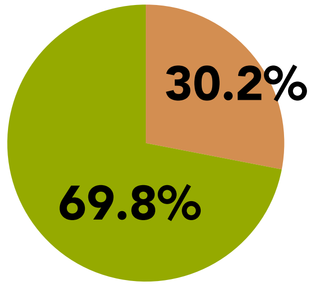


# 11. COMMERCIALIZATION BY CATEGORY

## 11.2 Segmentation by Domestic Market* and Foreign Market

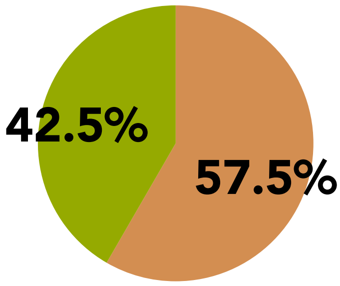
| | 2018 | 2019 | % change |
|---|---|---|---|
| ***CAVA*** | *212,960* | *219,057* | *2.9%* |
| *Domestic Market** | *59,717* | *66,102* | *10.7%* |
| *Foreign Market* | *153,243* | *152,955* | *-0.2%* |

** In thousands of bottles.*



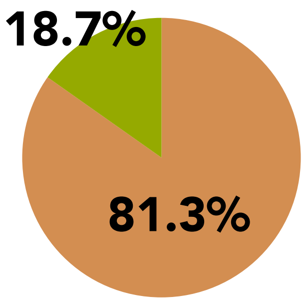

| | | | |
|---|---|---|---|
| ***CAVA RESERVA*** | *26,681* | *26,841* | *0.6%* |
| *Domestic Market** | *15,570* | *15,440* | *-0.8%* |
| *Foreign Market* | *11,112* | *11,401* | *2.6%* |

** In thousands of bottles.*



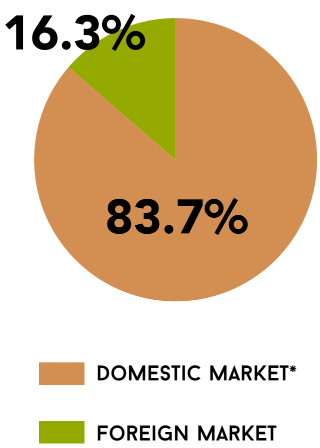

| | | | |
|---|---|---|---|
| ***CAVA GRAN RESERVA*** | *4,701* | *3,619* | *-23.0%* |
| *Domestic Market** | *3,984* | *2,944* | *-26.1%* |
| *Foreign Market* | *717* | *675* | *-5.8%* |

** In thousands of bottles.*




| | | | |
|---|---|---|---|
| ***CAVA P, CALIFICADO*** | *131* | *27* | *-79.3%* |
| *Domestic Market** | *113* | *22,6* | *-80.0%* |
| *Foreign Market* | *18* | *4,4* | *-75.4%* |

** In thousands of bottles.*



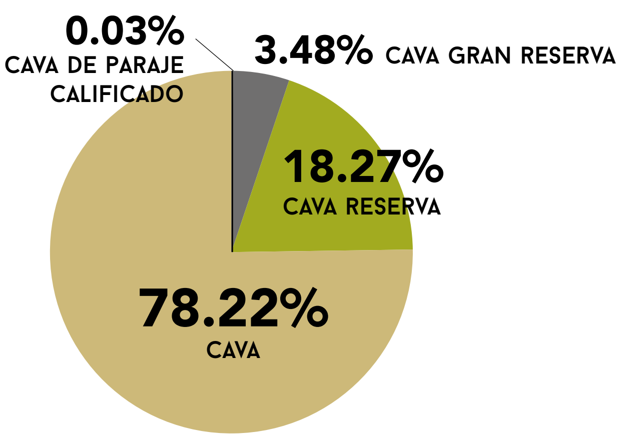

** Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

# 11. COMMERCIALIZATION BY CATEGORY

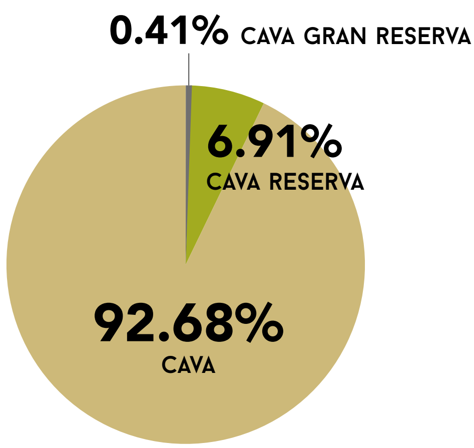
## 11.3 Segmentation by Domestic Market* and Foreign Market


| | TOTAL 2018 | DOMESTIC MARKET* | FOREIGN MARKET | TOTAL 2019 | DOMESTIC MARKET* | FOREIGN MARKET |
|---|---|---|---|---|---|---|
| CAVA DE PARAJE CALIFICADO Min. 36 months | 131 | 113 | 18 | 27 | 22,6 | 4,4 |
| CAVA GRAN RESERVA Min. 30 months | 4,701 | 3,984 | 717 | 3,619 | 2,944 | 675 |
| CAVA RESERVA Min. 15 months | 26,681 | 15,570 | 11,112 | 26,841 | 15,440 | 11,401 |
| CAVA Min. 9 months | 212,960 | 59,717 | 153,243 | 219,057 | 66,102 | 152,955 |
| TOTAL CAVA | 244,472 | 79,384 | 165,089 | 249,544 | 84,508 | 165,035 |

* *In thousands of bottles.*




**Domestic Market***




**Foreign Market**

* *Calculation of "Domestic" Market = Total Production - Foreign Market sales.*

# 11. COMMERCIALIZATION BY CATEGORY

## 11.4 Ranking of shipments by country

| CAVA TRADITIONAL | | |
|---|---|---|
| 1 | Germany | 30,063,575 |
| 2 | Belgium | 24,276,797 |
| 3 | United Kingdom | 18,922,849 |
| 4 | USA | 18,676,560 |
| 5 | France | 10,593,965 |
| 6 | Japan | 9,618,520 |
| 7 | Sweden | 5,536,753 |
| 8 | Netherlands | 4,972,525 |
| 9 | Russia | 3,054,361 |
| 10 | Finland | 2,737,723 |
| 11 | Switzerland | 2,516,425 |
| 12 | Canada | 2,207,295 |
| 13 | Poland | 2,201,172 |
| 14 | Denmark | 1,979,080 |
| 15 | Norway | 1,285,661 |
| 16 | Austria | 1,050,201 |
| 17 | Brazil | 1,047,440 |
| 18 | Lithuania | 929,535 |
| 19 | Israel | 828,959 |
| 20 | Estonia | 798,567 |
| 21 | Latvia | 702,684 |
| 22 | Ukraine | 668,952 |
| 23 | Australia | 664,991 |
| 24 | South Korea | 517,365 |
| 25 | Luxembourg | 494,273 |
| 26 | Dominican Rep. | 427,491 |
| 27 | Uruguay | 407,772 |
| 28 | China | 365,959 |
| 29 | Mexico | 363,207 |
| 30 | Portugal | 343,009 |
| 31 | Italy | 278,361 |
| 32 | Spain (free zones) | 257,153 |
| 33 | Czech Republic | 229,001 |
| 34 | Nigeria | 222,332 |
| 35 | Qatar | 202,771 |

| CAVA RESERVA | | |
|---|---|---|
| 1 | Belgium | 2,790,871 |
| 2 | Sweden | 1,195,484 |
| 3 | USA | 1,077,659 |
| 4 | Japan | 1,056,927 |
| 5 | Canada | 769,487 |
| 6 | Netherlands | 537,453 |
| 7 | Germany | 521,289 |
| 8 | United Kingdom | 520,756 |
| 9 | Norway | 502,440 |
| 10 | Russia | 298,175 |
| 11 | Finland | 246,689 |
| 12 | Denmark | 219,851 |
| 13 | Dominican Rep, | 150,405 |
| 14 | Switzerland | 122,001 |
| 15 | Peru | 100,524 |
| 16 | Estonia | 92,168 |
| 17 | Poland | 86,484 |
| 18 | France | 83,953 |
| 19 | South Korea | 78,051 |
| 20 | Australia | 57,991 |
| 21 | Colombia | 55,909 |
| 22 | Latvia | 55,745 |
| 23 | Taiwan | 52,977 |
| 24 | Ukraine | 46,828 |
| 25 | Lithuania | 46,557 |
| 26 | Ireland | 40,405 |
| 27 | Italy | 34,663 |
| 28 | China | 33,748 |
| 29 | Israel | 31,269 |
| 30 | Spain (free zones) | 31,223 |
| 31 | Panama | 29,283 |
| 32 | Mexico | 29,057 |
| 33 | Andorra | 26,059 |
| 34 | Netherlands | 24,936 |
| 35 | Hong Kong | 24,732 |

** Number of bottles.*

## CAVA GRAN RESERVA

| | | |
|---|---|---|
| 1 | United States | 145,171 |
| 2 | Canada | 73,149 |
| 3 | Norway | 54,037 |
| 4 | Netherlands | 47,757 |
| 5 | Belgium | 39,260 |
| 6 | Spain (free zones) | 33,388 |
| 7 | Japan | 33,329 |
| 8 | Sweden | 26,759 |
| 9 | Germany | 18,808 |
| 10 | Finland | 16,364 |
| 11 | Denmark | 15,447 |
| 12 | Andorra | 15,285 |
| 13 | Ukrine | 14,936 |
| 14 | Peru | 12,667 |
| 15 | Mexico | 11,287 |
| 16 | Switzerland | 10,316 |
| 17 | South Korea | 10,188 |
| 18 | Portugal | 9,400 |
| 19 | Latvia | 7,723 |
| 20 | Colombia | 7,243 |
| 21 | United Kingdom | 7,119 |
| 22 | Austria | 6,091 |
| 23 | Estonia | 5,872 |
| 24 | Poland | 5,564 |
| 25 | Dominican Rep, | 5,255 |
| 26 | Lithuania | 4,239 |
| 27 | Italy | 3,825 |
| 28 | Iceland | 3,360 |
| 29 | Panama | 3,271 |
| 30 | Russia | 3,196 |
| 31 | Luxembourg | 2,940 |
| 32 | Hungary | 2,360 |
| 33 | Brazil | 2,297 |
| 34 | Czech Republic | 1,615 |
| 35 | Puerto Rico | 1,572 |

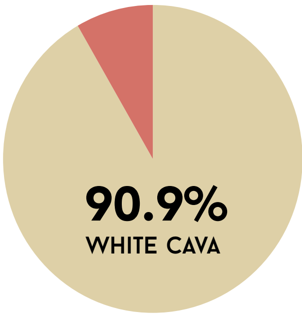
** Numbers of bottles.*

## CAVA DE PARAJE CALIFICADO

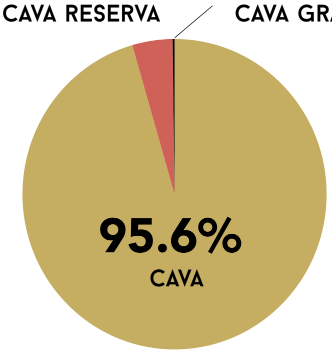
| | | |
|---|---|---|
| 1 | Sweden | 1,325 |
| 2 | Finland | 583 |
| 3 | Belgium | 459 |
| 4 | Germany | 309 |
| 5 | United States | 265 |
| 6 | Switzerland | 205 |
| 7 | Ireland | 191 |
| 8 | Netherlands | 153 |
| 9 | Portugal | 151 |
| 10 | Poland | 101 |
| 11 | China | 96 |
| 12 | United Kingdom | 95 |
| 13 | Republic of South Africa | 72 |
| 14 | Taiwan | 60 |
| 15 | Costa Rica | 55 |
| 16 | Norway | 53 |
| 17 | Mexico | 48 |
| 18 | Ukraine | 36 |
| 19 | Andorra | 32 |
| 20 | Japan | 19 |
| 21 | Slovakia | 12 |
| 22 | Russia | 12 |
| 23 | Estonia | 12 |
| 24 | Canada | 12 |
| 25 | Puerto Rico | 11 |

** Numbers of bottles.*

# 12. COMMERCIALIZATION OF ROSÉ CAVA




**Base: Total Cava**




**Base: Total Rosé Cava**

| | 2015 | 2016 | 2017 | 2018 | 2019 | % evol, |
|---|---|---|---|---|---|---|
| WHITE CAVA | 223,240,790 | 223,712,222 | 231,556,207 | 224,032,798 | 226,883,470 | 1.2% |
| ROSÉ CAVA | 20,882,339 | 21,443,766 | 20,956,129 | 20,439,542 | 22,661,226 | 10.8% |
| TOTAL CAVA | 244,123,129 | 245,155,988 | 252,512,336 | 244,472,340 | 249,544,696 | 2.07% |

* Number of bottles.

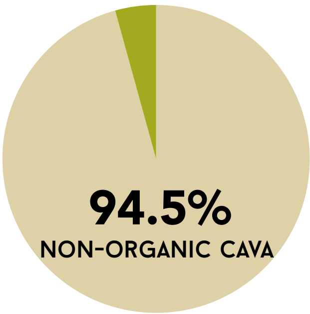
| | | | | | |
|---|---|---|---|---|---|
| % ROSÉ CAVA OF TOTAL CAVA PRODUCED | 8.6% | 8.7% | 8.3% | 8.4% | 9.08% |

| ROSÉ CAVA | 2015 | 2016 | 2017 | 2018 | 2019 | % evol, |
|---|---|---|---|---|---|---|
| CAVA | 19,683,940 | 20,486,674 | 20,324,170 | 19,523,533 | 21,669,173 | 10.9% |
| CAVA RESERVA | 1,175,459 | 901,073 | 585,425 | 875,304 | 940,886 | 7.4% |
| CAVA GRAN RESERVA | 22,940 | 56,019 | 46,534 | 40,704 | 51,168 | 25.7% |
| TOTAL ROSÉ CAVA | 20,882,339 | 21,443,766 | 20,956,129 | 20,439,542 | 22,661,227 | 10.8% |

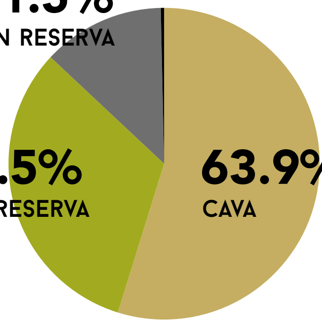
* Number of bottles.

| | | | | | |
|---|---|---|---|---|---|
| % PREMIUM ROSÉ CAVA OF TOTAL CAVA PRODUCED | 5.7% | 4.5% | 3.0% | 4.5% | 4.4% |

# 13. COMMERCIALIZATION OF ORGANIC CAVA




**Base: Total Cava**




**Base: Total Organic Cava**

| | 2016 | 2017 | 2018 | 2019 | % change |
|---|---|---|---|---|---|
| TOTAL NON-ORGANIC CAVA | 241,134,135 | 246,553,252 | 233,981,407 | 235,748,543 | 0.7% |
| TOTAL ORGANIC CAVA | 4,021,853 | 5,959,084 | 10,490,933 | 13,796,153 | 31.5% |
| TOTAL CAVA | 245,155,988 | 252,512,336 | 244,472,340 | 249,544,696 | 2.07% |

* Number of bottles.

| | | | | |
|---|---|---|---|---|
| % ORGANIC CAVA OF TOTAL CAVA PRODUCED | 1.6% | 2.4% | 4.3% | 5.5% |

| ORGANIC CAVA | 2016 | 2017 | 2018 | 2019 | % change |
|---|---|---|---|---|---|
| CAVA | 2,756,043 | 3,930,595 | 5,750,182 | 8,815,270 | 53.3% |
| CAVA RESERVA | 1,055,766 | 1,639,486 | 3,374,286 | 3,382,243 | 0.2% |
| CAVA GRAN RESERVA | 210,044 | 388,438 | 1,330,109 | 1,590,377 | 19.5% |
| CAVA DE PARAJE CALIFICADO | | 520 | 36,355 | 8,263 | -77.2% |
| TOTAL ORGANIC CAVA | 4,021,853 | 5,959,084 | 10,490,933 | 13,796,153 | 31.5% |

* Number of bottles.

| | | | | |
|---|---|---|---|---|
| % PREMIUM ORGANIC CAVA OF TOTAL ORGANIC CAVA PRODUCED | 31.5% | 34.0% | 45.2% | 36.1% |

# 14. DOMESTIC MARKET CONSUMPTION

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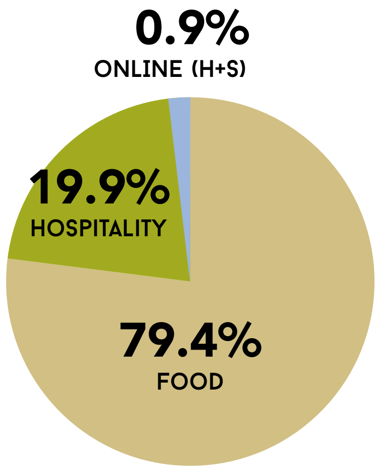
## 14.1 Distribution and evolution of consumption by channel

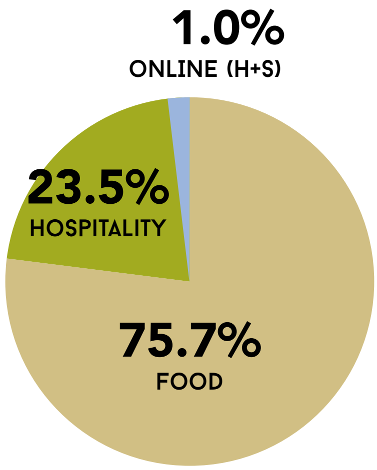
**Volume (% Units)**




**CAVA:** -1.3%

(Volume variation)

**Value (% Euros)**




**CAVA:** -0.5%

(Value variation)

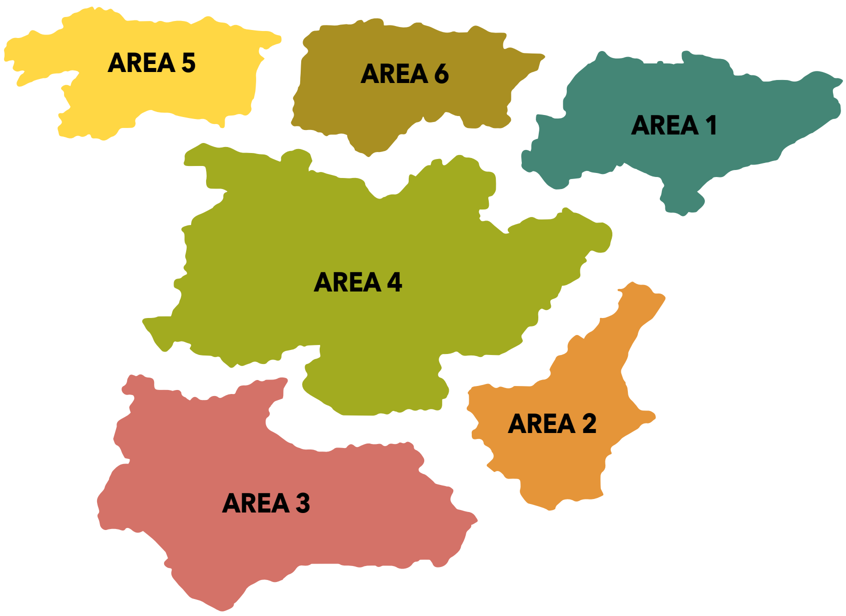
* The online channel includes sales from chains that sell online (not specialist wine websites).

| *% CHANGE FROM PREVIOUS YEAR* | | |
|---|---|---|
| | *VOLUME* | *VALUE* |
| *FOOD* | *- 0.1%* | *1.8 %* |
| *HOSPITALITY* | *- 5.6%* | *-7.3 %* |
| *ONLINE (H+S)* | *12.3 %* | *15.9 %* |

** Source: ACNielsen data for total mobile year ending January 2020.*

nielsen

## 14.2 Distribution of consumption by geographical area




| | *Volume (% Unit)* | *% change* | *Value ( % Euros)* | *% change* |
|---|---|---|---|---|
| *AREA 1 NORTH-EAST* | *27%* | *- 1%* | *28%* | *+ 1%* |
| *BARCELONA METROPOLITAN AREA* | *20%* | *- 8%* | *22%* | *- 8%* |
| *AREA 2 CENTRE-WEST* | *16%* | *+ 4%* | *14%* | *+ 4%* |
| *AREA 3 SOUTH* | *11%* | *+ 4%* | *9%* | *+ 4%* |
| *AREA 4 CENTRE* | *4%* | *+ 3%* | *3%* | *+ 6%* |
| *MADRID METROPOLITAN AREA* | *6%* | *+ 0%* | *6%* | *+ 2%* |
| *AREA 5 NORTH-WEST* | *5%* | *- 4%* | *5%* | *+ 0%* |
| *AREA 6 CENTRE-NORTH* | *11%* | *- 2%* | *11%* | *- 2%* |

**CAVA:** -1.3% **CAVA:** -0.5%

** Source: ACNielsen data for total mobile year ending January 2020.*

## 15. KEY FIGURES 2019

**322.4**
**MILLION**
KG OF GRAPES

*TOTAL PRODUCTION 2019*
**249,544,696**

**2.07%**
▲ *VS/2018*

*Cava production*
**219,056,865**

**+2.8%**
▲ *VS/2018*

*Premium Cava production*
**30,487,831**

**-3.2%**
▼ *VS/2018*

*Non-organic Cava production*
**235,748,543**

**+0.7%**
▲ *VS/2018*

*Organic Cava production*
**13,796,153**

**+31.5%**
▲ *VS/2018*

*Rosé Cava production*
**22,661,226**

**+10.8%**
▲ *VS/2018*

**214**
**CAVA PRODUCERS**
*2019*

**143**
**BASE WINE PRODUCERS**
*2019*

DENOMINACIÓN DE ORIGEN
CAVA

www.docava.es/en/