D.O. CAVA

Global report 2021

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 CONSUMPTION

National Cava consumption figures are provided by consultancy firms NielsenIQ and IRI correspond to the total Market (food and catering).

NielsenIQ and IRI are leading consultancy firms (food, catering and online) 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. Memoria 2021

Despite the economic challenges, 2021 was a year of memorable results. CAVA has demonstrated its great resilience, proving the strength of the sector. The year closed with a record number of shipments, 17.33% growth and a volume of 252 million bottles, the highest figure in the history of CAVA.

Sales to foreign markets showed the universal popularity of CAVA, with an unparalleled ability to cross borders; 71% of the D.O.'s total sales are international.

Abroad, Germany maintained its position as the main consumer country (4.23%), followed by the United States (with impressive growth of 40%), Belgium, the United Kingdom and Japan, among the top five countries. Growth in Austria (65.54%), Brazil (37.69%), and Poland (27.35%) were also notable, with double-digit increases.

Domestic market sales increased by 19.04%, reaching 68,762,000 bottles. The channel that has seen the sharpest increase was online sales, with a growth of 17.7% in value and 19.3% in volume, while the food and beverage channel continued its upward trend, increasing by 6.1% in value and 5.1% in volume. Offline and hospitality channels also evolved positively in value by 5.9% and 5.3%, and 4.9% and 2.3% in volume respectively, according to NielsenIQ data.

Thanks to the D.O.'s commitment to ecology and sustainability, higher-value CAVAs with long aging achieved unprecedented growth. The category of organic CAVA stands out within the D.O. CAVA itself, as a result of the new regulations that set 2025 as the decisive year when the entire category of Guarda Superior will be 100% organic.

The number of bottles produced and labelled now exceeds 22,797,356 bottles, with an impressive growth of 65.43% compared to 2020, consolidating a category that is in a state of transition for certain winemakers in the Designation of Origin.

The category of Guarda Superior (more than 18 months of aging) grew by a spectacular 104.25%. Among the notable trends in 2021, Rosé CAVA also experienced impressive growth of 29.71%, showing the consumer's continued interest in the pink-coloured variety.

The fresh direction taken by D.O. CAVA, in terms of its strategic commitment to the new segmentation and zoning, focuses strongly on sustainable territory and CAVA production, with the guarantee that only a Designation of Origin can provide: clear proof that the designation is on the right path.

In this sense, 2022 will be a key year in the history of the CAVA Designation of Origin. Last year the initial phase of the Strategic Plan for CAVA segmentation and zoning was implemented, establishing a procedure to strengthen the CAVA D.O. inspection measures, and a product information and traceability system. This year will see the launch of the first quality seals under these new regulations, which feature the geographical origin and product segment. These developments represent both a challenge and an achievement for all those associated with the Designation of Origin.

In addition, the "360 degrees of CAVA" promotional campaign ran throughout last year, allowing numerous influencers and bubble-lovers to taste and learn about the versatility and excellence of CAVA. This campaign incorporated both face-to-face and digital activities, segmented by target audience and involving the various associated wineries. The high-level educational programme will continue this year, complemented by the professional certifications offered by the CAVA Academy, the e-learning platform about CAVA launched in 2021. CAVA Academy has already provided exclusive training to more than 150 professionals from around the world.

As part of its communication strategy, the D.O. is promoting the year-round consumption of CAVA, with an action plan that positions the quality Spanish sparkling wine as the ideal choice to accompany any meal in the world, enhancing every dish, and positioning CAVA among the most versatile bubbles. One of the main objectives in promoting CAVA is to demonstrate its role as the gastronomic wine par excellence, ideal for pairing with all global cuisines.

The CAVA Protected Designation of Origin guarantees the territory, landscape and economic sector. Our quest for excellence must coexist with respect for the land, and a legacy that will be passed on to future generations.

Javier Pagés Font
Presidente del Consejo Regulador de la DOP Cava

3. Registrations

3.1 WINEGROWING OPERATIONS

Number of operators 2021

6.284

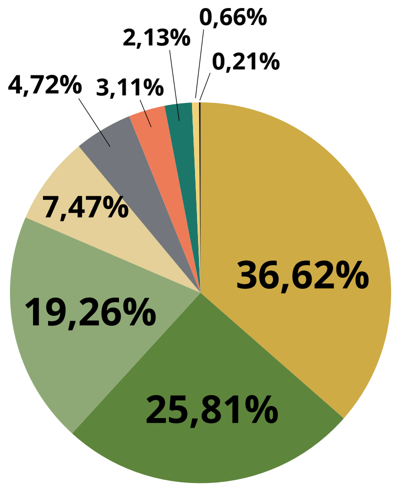
Registered surface area (Ha) 2021

38.133,48 Hectares

YEAR	NUMBER OF OPERATORS	% change	REGISTERED SURFACE AREA (HA)	% change
2021	6.284	0,0%	38.133,48	-0,05%
2020	6.391	-2,90%	38.151,74	0,52%
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	

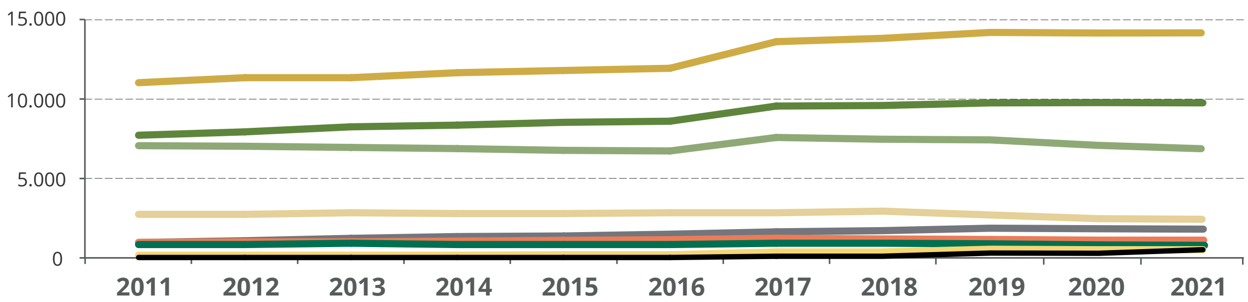
3. Registrations

3.2 REGISTERED SURFACE AREA BY VARIETY



	2021 (Ha)
MACABEU	13.966,31
XAREL·LO	9.841,47
PARELLADA	7.345,58
CHARDONNAY	2.848,98
GARNATXA NEGRA	1.801,69
TREPAT	1.185,41
PINOT NOIR	811,44
SUBIRAT PARENT	250,86
MONASTRELL	81,74
TOTAL	38.133,48

* In Hectares



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
MACABEU	11.095	11.390	11.420	11.718	11.847	11.996	13.639	13.828	13.909	13.955	13.966
XAREL·LO	7.769	7.971	8.293	8.392	8.566	8.626	9.558	9.599	9.603	9.825	9.841
PARELLADA	7.086	7.044	6.994	6.931	6.816	6.772	7.563	7.472	7.451	7.385	7.345
CHARDONNAY	2.899	2.903	2.971	2.925	2.926	2.965	2.989	3.036	2.935	2.881	2.848
GARNATXA NEGRA	984	1.076	1.237	1.346	1.377	1.453	1.616	1.673	1.776	1.783	1.801
TREPAT	990	1.004	1.013	1.057	1.103	1.109	1.179	1.168	1.164	1.177	1.185
PINOT NOIR	839	866	883	848	837	853	875	873	808	817	811
SUBIRAT PARENT	74	73	73	72	78	88	235	225	232	250	250
MONASTRELL	29	28	30	36	41	41	52	50	77	78	81
TOTAL	**31.765**	**32.355**	**32.914**	**33.325**	**33.591**	**33.903**	**37.706**	**37.924**	**37.955**	**38.152**	**38.133**

* In Hectares

3. Registrations

3.3 PRODUCERS

Number of Cava producers
2021

205

Number of Base Wine producers
2021

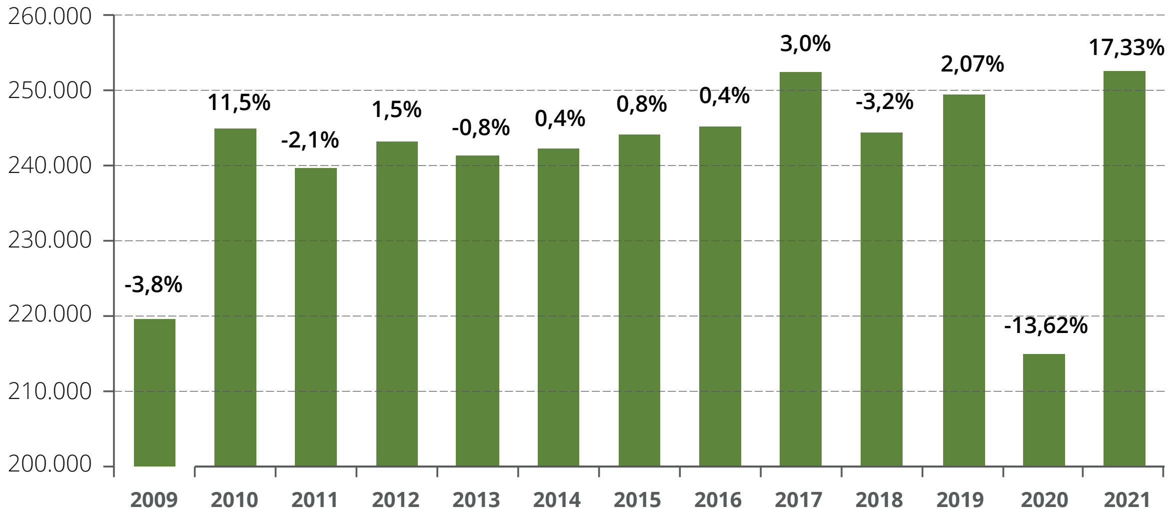
144

YEAR	NUMBER OF CAVA PRODUCERS	% change	NUMBER OF BASE WINE PRODUCERS	% change
2021	205	- 1,9%	144	0,6%
2020	209	- 2,3%	143	0,0%
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 2021	**Variation** Previous year
252.931.748 bottles	**17,33%**

THOUSANDS OF BOTTLES

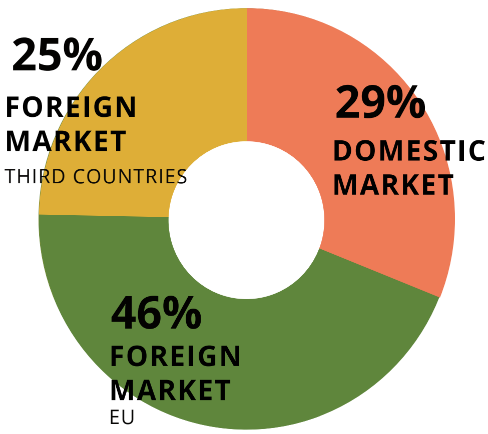


2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
219.463	244.801	239.555	243.232	241.365	242.288	244.123	245.156	252.512	244.472	249.544	215.566	252.931

* In thousands of bottles.

5. Cava around the world

5.1 SALES IN THE DOMESTIC MARKET AND FOREIGN MARKET



Total Domestic Market	**% change** S/2020
68.762	19,04%
Total Foreign Market	**% change** S/2020
109.950	3,16%
Foreign Market Third countries	**% change.** S/2020
59.511	30,46%
Total Market	**% change** S/2020
238.223	13,46%

6. Foreign Market countries

6.1 FOREIGN MARKET. TOP 20 COUNTRIES.

RK 2021	COUNTRY	Dif. Ranking	% change	THOUSANDS OF BOTTLES 2021	2020
1	Germany	=	4,64%	29.243	27.946
2	US	+2	40,00%	23.719	16.942
3	Belgium	=	11,56%	22.886	20.514
4	UK	-2	-3,90%	19.918	20.726
5	Japan	=	7,94%	10.741	9.951
6	France	=	2,53%	9.232	9.004
7	Sweden	=	14,77%	8.694	7.575
8	Netherlands	=	19,90%	7.328	6.112
9	Russia	+1	64,43%	6.480	3.941
10	Canada	+1	12,10%	3.539	3.157
11	Finland	-2	-31,05%	2.314	3.356
12	Poland	+1	27,35%	2.077	1.631
13	Swiss	-1	-33,82%	1.781	2.691
14	Denmark	+1	8,14%	1.713	1.584
15	Austria	+5	65,54%	1.619	978
16	Brazil	+1	37,69%	1.527	1.109
17	Norway	-3	-12,62%	1.406	1.609
18	Ukraine	=	15,45%	1.278	1.107
19	Lithuania	-3	-30,51%	795	1.144
20	Estonia	-1	-31,27%	712	1.036

6. Foreign Market countries

6.2 FOREIGN MARKET. RANKING TOP 50 COUNTRIES.

RK 2021	COUNTRY	BOTTLES	% change
1	Germany	29.243	4,64%
2	US	23.719	40,00%
3	Belgium	22.886	11,56%
4	UK	19.918	-3,90%
5	Japan	10.741	7,94%
6	France	9.232	2,53%
7	Sweden	8.694	14,77%
8	Netherlands	7.328	19,90%
9	Russia	6.480	64,43%
10	Canada	3.539	12,10%
11	Finland	2.314	-31,05%
12	Poland	2.077	27,35%
13	Switzerland	1.781	-33,82%
14	Denmark	1.713	8,14%
15	Austria	1.619	65,54%
16	Brazil	1.527	37,69%
17	Norway	1.406	-12,62%
18	Ukraine	1.278	15,45%
19	South Korea	932	73,88%
20	Israel	803	47,07%
21	Lithuania	795	-30,51%
22	China	746	81,51%
23	Luxembourg	727	18,99%
24	Estonia	712	-31,27%
25	Australia	561	-25,50%

RK 2021	COUNTRY	BOTTLES	% change
26	Latvia	518	-41,07%
27	Italy	500	0,81%
28	Puerto Rico	464	274,19%
29	Dominican Rep.	447	33,83%
30	Ireland	437	32,83%
31	Portugal	416	44,95%
32	Mexico	415	32,59%
33	Uruguay	334	7,40%
34	Hong Kong	265	9,96%
35	Chile	261	89,13%
36	Czech Rep.	247	20,49%
37	Costa Rica	222	141,30%
38	Croatia	206	128,89%
39	Belarus	201	-40,71%
40	Colombia	177	59,46%
41	Panama	171	96,55%
42	Peru	158	28,46%
43	Iceland	132	29,41%
44	Slovakia	130	-46,28%
45	New Zealand	124	-6,77%
46	Spain (free zones)	95	-62,30%
47	Andorra	95	-4,04%
48	Qatar	91	-28,91%
49	Eslovenia	76	-44,12%
50	Singapore	70	-20,45%

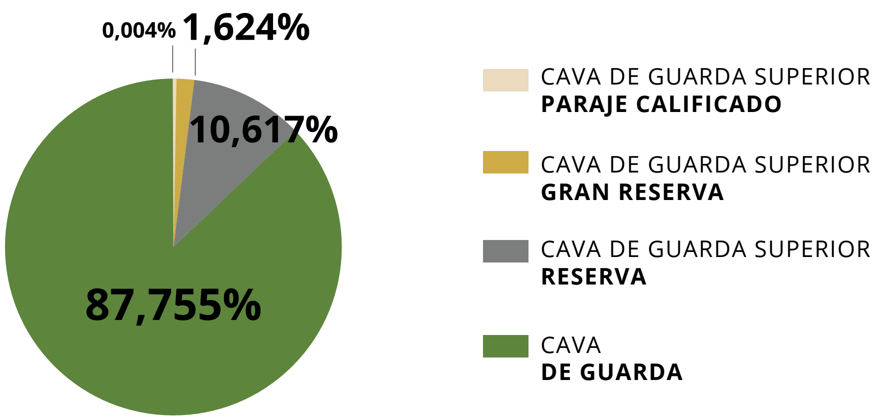
* In thousands of bottles.

7. Commercialization by category

7.1 SEGMENTATION

	2021	%
CAVA GUARDA SUPERIOR **PARAJE CALIFICADO** Min. 36 months	10.000	-15,70%
CAVA DE GUARDA SUPERIOR **GRAN RESERVA** Min. 30 months	3.868.000	25,02%
CAVA DE GUARDA SUPERIOR **RESERVA** Min. 18 months	25.292.000	23,66%
CAVA **DE GUARDA** Min. 9 months	209.051.000	12,15%
TOTAL	**238.221.000**	**13,46%**

* In bottles.

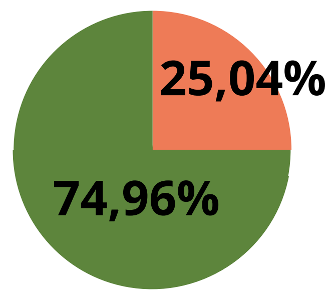


7. Commercialization by category

7.2 SEGMENTATION BY DOMESTIC MARKET AND FOREIGN MARKET

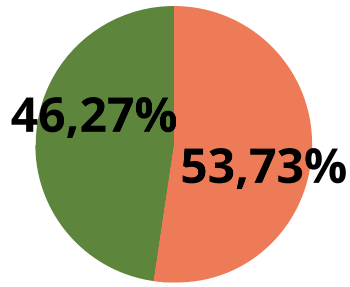
	2021	% change
CAVA **DE GUARDA**	**209.050**	**12,15%**
Domestic Market	52.353	17,98%
Foreign Market	156.697	10,33%

* In thousands of bottles.



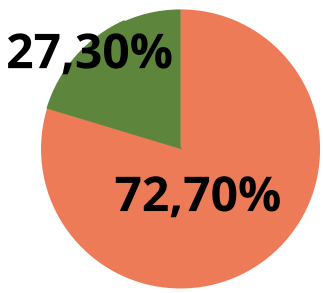
CAVA DE GUARDA SUPERIOR **RESERVA**	**25.292**	**23,66%**
Domestic Market	13.589	24,61%
Foreign Market	11.703	22,57%

* In thousands of bottles.



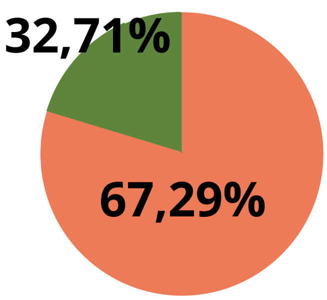
CAVA DE GUARDA SUPERIOR **GRAN RESERVA**	**3.868**	**25,02%**
Domestic Market	2.812	13,75%
Foreign Market	1.056	69,77%

* In thousands of bottles.



CAVA DE GUARDA SUPERIOR **PARAJE CALIFICADO**	**10.7**	**-4,46%**
Domestic Market	7.2	-23,40%
Foreign Market	3.5	94,44%

* In thousands of bottles.



DOMESTIC MARKET

FOREIGN MARKET

7. Commercialization by category

7.4 RANKING OF SHIPMENTS BY COUNTRY

CAVA DE GUARDA		
1	Germany	28.674.184
2	US	21.742.435
3	Belgium	20.686.713
4	UK	19.227.901
5	Japan	9.658.805
6	France	9.183.371
7	Sweden	7.563.987
8	Netherlands	6.521.789
9	Russia	6.207.007
10	Canada	2.700.248
11	Finland	2.084.477
12	Poland	1.970.832
13	Switzerland	1.628.401
14	Austria	1.593.637
15	Brazil	1.478.857
16	Denmark	1.471.655
17	Ukraine	1.165.493
18	Norway	964.355
19	Israel	769.889
20	South Korea	730.753
21	Lithuania	721.091
22	Luxembourg	720.779
23	China	649.511
24	Estonia	599.640
25	Australia	532.020
26	Latvia	444.044
27	Puerto Rico	415.563
28	Italy	414.637
29	Ireland	393.785
30	Portugal	381.557
31	Mexico	358.581
32	Dominican Rep.	354.284
33	Uruguay	330.505
34	Hong Kong	232.253
35	Chile	223.739

* Number of bottles.

CAVA DE GUARDA SUPERIOR RESERVA		
1	Belgium	2.151.245
2	US	1.756.792
3	Sweden	1.063.016
4	Japan	1.040.291
5	Netherlands	762.892
6	Canada	712.911
7	UK	668.439
8	Germany	518.532
9	Norway	398.912
10	Russia	258.479
11	Finland	214.807
12	Denmark	200.495
13	South Korea	185.758
14	Switzerland	130.599
15	Estonia	97.564
16	Poland	96.840
17	Ukraine	96.061
18	Saint Kitts	95.644
19	China	92.692
20	Dominican Rep.	80.973
21	Italiy	76.540
22	Lithuania	64.976
23	Latvia	60.875
24	Mexico	48.528
25	Belarus	48.415
26	Puerto Rico	47.688
27	Colombia	47.425
28	France	46.789
29	Panamá	44.877
30	Brazil	44.399
31	Ireland	40.797
32	Peru	39.164
33	Chile	36.320
34	Israel	33.543
35	Czech Rep.	33.016

* Number of bottles.

7. Commercialization by category

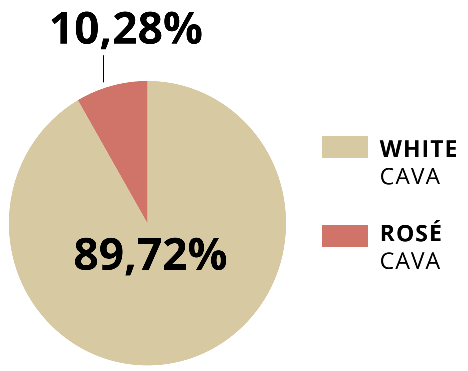
CAVA DE GUARDA SUPERIOR **GRAN RESERVA**		
1	US	219.573
2	Canada	125.953
3	Sweden	67.689
4	South Korea	71.685
5	Alemania	50.715
6	Germany	48.915
7	Netherlands	43.811
8	Norway	42.844
9	Japan	41.684
10	Denmark	41.141
11	UK	22.408
12	Switzerland	22.040
13	Portugal	19.503
14	Ukraine	16.612
15	Estonia	15.440
16	Finland	15.157
17	Russia	14.709
18	Latvia	13.337
19	Dominican Rep.	12.171
20	Austria	10.709
21	Andorra	10.655
22	Poland	9.880
23	Lithuania	9.779
24	Spain (free zones)	9.715
25	Italy	9.125
26	Taiwan	8.529
27	Mexico	7.921
28	Saint Kitts	7.800
29	Iceland	7.795
30	Perú	6.983
31	Czech Rep.	5.352
32	Panamá	4.231
33	Australia	4.123
34	Brazil	3.900
35	Hong Kong	3.663

* Number of bottles.

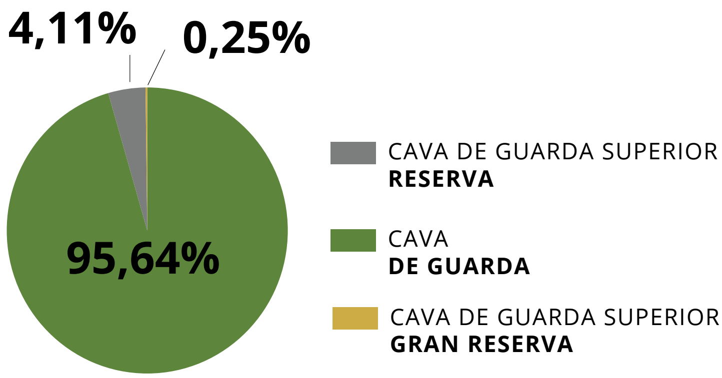
CAVA DE GUARDA SUPERIOR **PARAJE CALIFICADO**		
1	Japan	480
2	China	460
3	US	308
4	Portugal	252
5	Austria	240
6	Switzerland	235
7	Germany	160
8	Finland	144
9	Malta	125
10	Ukraine	113
11	Canada	104
12	Singapur	101
13	France	96
14	Ireland	89
15	Denmark	76
16	Russia	67
17	Belgium	63
18	Mexico	48
19	Netherlands	41
20	Hungary	36
21	Taiwan	36
22	Poland	29
23	Belarus	29
24	UK	24
25	Thailand	24
26	Hong Kong	24
27	Costa Rica	20
28	Thailandia	13
29	Sweden	12
30	Puerto Rico	11
31	Estonia	5
32	Spain (free zones)	3

* Number of bottles.

8. Commercialization of Rosé Cava



BASE: TOTAL CAVA



BASE: TOTAL ROSÉ CAVA

	2015	2016	2017	2018	2019	2020	2021	% change
WHITE CAVA	223.240.790	223.712.222	231.556.207	224.032.798	226.883.470	195.514.857	226.922.064	16,06%
ROSÉ CAVA	20.882.339	21.443.766	20.956.129	20.439.542	22.661.226	20.052.096	26.009.685	29,71%
TOTAL CAVA	244.123.129	245.155.988	252.512.336	244.472.340	249.544.696	215.566.953	252.931.748	17,33%
	8,6%	8,7%	8,3%	8,4%	9,08%	9,30%	10,28%	

* Number of bottles.

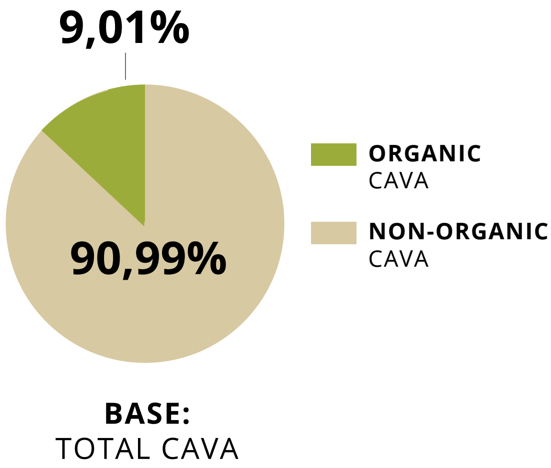
% ROSÉ CAVA OF TOTAL CAVA PRODUCED.

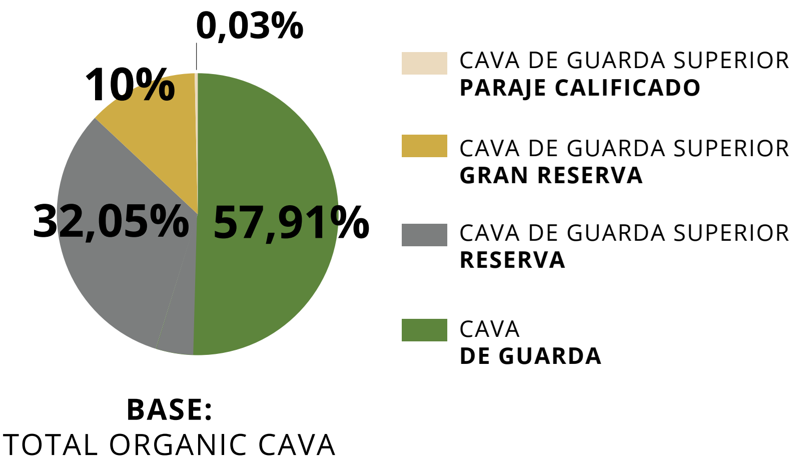
ROSÉ CAVA	2015	2016	2017	2018	2019	2020	2021	% change
CAVA	19.683.940	20.486.674	20.324.170	19.523.533	21.669.173	19.508.468	24.875.366	27,51%
CAVA RESERVA	1.175.459	901.073	585.425	875.304	940.886	508.463	1.068.569	110,16%
CAVA GRAN RESERVA	22.940	56.019	46.534	40.704	51.168	35.165	65.749	86,97%
TOTAL PREMIUM ROSÉ CAVA	20.882.339	21.443.766	20.956.129	20.439.542	22.661.227	20.052.096	26.009.685	29,71%
	5,7%	4,5%	3,0%	4,5%	4,4%	2,71%	4,36%	

* Number of bottles.

% PREMIUM ROSÉ CAVA OF TOTAL CAVA PRODUCED.

9. Commercialization of organic Cava





	2016	2017	2018	2019	2020	2021	% change
TOTAL NON-ORGANIC CAVA	241.134.135	246.553.252	233.981.407	235.748.543	201.786.243	230.134.392	14,05%
TOTAL ORGANIC CAVA	4.021.853	5.959.084	10.490.933	13.796.153	13.780.711	22.797.356	65,43%
TOTAL CAVA		252.512.336	244.472.340	249.544.696	215.566.954	252.931.748	17,33%

* Number of bottles.

	2016	2017	2018	2019	2020	2021
% ORGANIC CAVA OF TOTAL CAVA PRODUCED.	**1,6%**	**2,4%**	**4,3%**	**5,5%**	**6,39%**	**9,01%**

ORGANIC CAVA	2016	2017	2018	2019	2020	2021	% change
CAVA	2.756.043	3.930.595	5.750.182	8.815.270	9.083.178	13.202.727	45,35%
CAVA RESERVA	1.055.766	1.639.486	3.374.286	3.382.243	3.127.536	7.307.413	133,65%
CAVA GRAN RESERVA	210.044	388.438	1.330.109	1.590.377	1.567.798	2.280.474	45,46%
CAVA DE PARAJE CALIFICADO		520	36.355	8.263	2.199	6.741	206,55%
TOTAL ORGANIC CAVA	4.021.853	5.959.084	10.490.933	13.796.153	13.780.711	22.797.356	39,55%

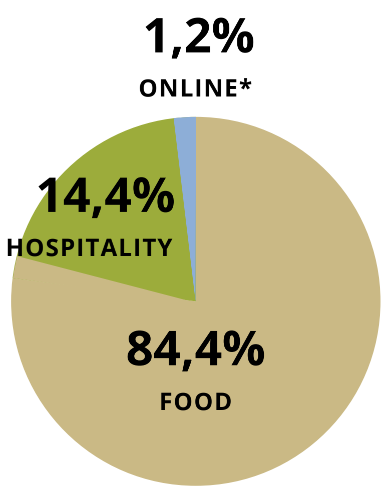
* Number of bottles.

	2016	2017	2018	2019	2020	2021
% PREMIUM ORGANIC CAVA OF TOTAL ORGANIC CAVA PRODUCED.	**31,5%**	**34,0%**	**45,2%**	**36,1%**	**34,09%**	**42,09%**

10. Domestic Market Consumption

10.1 DISTRIBUTION AND EVOLUTION OF CONSUMPTION BY CHANNEL

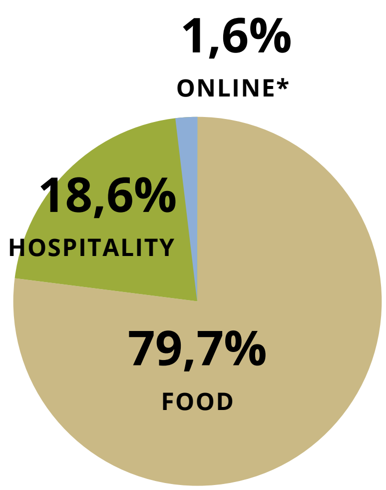
VOLUME (% UNITS)



CAVA: +4,6%

(Volume variation)

VALUE (% EUROS)



CAVA: +6,0%

(Value variation)

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

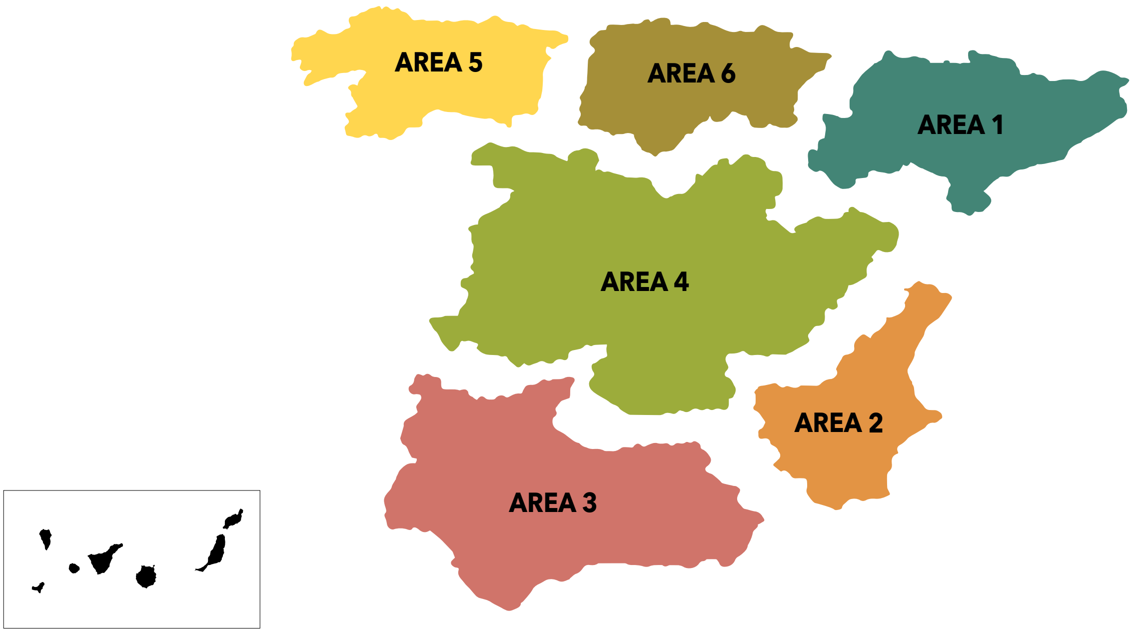
% CHANGE FROM PREVIOUS YEAR		
	VOLUMEN	**VALUE**
FOOD	+ 5,1%	+ 6,1%
HOSPITALITY	+ 2,3%	+ 5,3%
ONLINE (H+S)	+ 19,3 %	+ 17,7 %

* Sources: NielsenIQ and IRI. Data for total mobile year ending January 2022.

10. Domestic Market Consumption

IRi Growth delivered.

10.2 DISTRIBUTION OF CONSUMPTION BY GEOGRAPHICAL AREA



	Volume (% Unit)	% change	Value (% Euros)	% change
AREA 1 NORTH-EAST	25,2%	8,4%	25,8%	9,1%
BARCELONA METROPOLITAN AREA	17%	2%	18,3%	2,4%
AREA 2 CENTRE-WEST	16,4%	10,8%	14,3%	12,3%
AREA 3 SOUTH	12,7%	4,5%	11,2%	7,5%
AREA 4 CENTRE	3,9%	2%	3,6%	2,6%
MADRID METROPOLITAN AREA	6,6%	1,2%	7,1%	2,6%
AREA 5 NORTH-WEST	4,7%	- 2%	4,6%	- 0,5%
AREA 6 NORTH	7,8%	-4,1%	8,5%	-4,2%
AREA CANARY ISLANDS	4,3%	11,4%	4,7%	16,8%

+4,9% VOLUME **+5,9% VALUE**

* Source: IRI. Data for total mobile year ending January 2022.

11. Figures 2021

302.7
MILLION
KG OF GRAPES

TOTAL PRODUCTION
252,931,748

17,33%
S/ 2020

CAVA DE GUARDA PRODUCTION
209,051,000

12,15%
S/ 2020

CAVA DE GUARDA SUPERIOR ORGANIC PRODUCTION
9,594,628

104,25%
S/ 2020

NON-ORGANIC CAVA PRODUCTION
230,134,392

14.05%
S/ 2020

ORGANIC CAVA PRODUCTION
22,797,356

65.43%
S/ 2020

ROSÉ CAVA PRODUCTION
26,009,685

29.71%
S/ 2020

205
CAVA PRODUCERS

144
BASE WINE PRODUCERS

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