MACEDONIAN WINE INDUSTRY

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THE REPUBLIC OF MACEDONIA

- Landlocked country in the heart of the Balkans
- Border counties: Serbia, Kosovo, Albania, Bulgaria & Greece
- Size: 25.7 thousand km²
- Population: 2.0 million
- Candidate status for EU
THE REPUBLIC OF MACEDONIA

Structure of cultivated land %

- Arable land and gardens: 81%
- Meadows: 12%
- Vineyards: 4%
- Orchards: 3%
MACEDONIAN WINE INDUSTRY
History and Tradition

• In the culture of Ancient Macedonia, which covered a larger geographical area than today's Republic of Macedonia, wine played an important role.

• During the time of Philip II and Alexander the Great members of the Macedonian royal family were known as strong consumers of Macedonian wine.

• Macedonia was one of the most important regions for growing grapes in the Roman Empire.

• At the time of the rise of Christianity, wine was part of almost all Orthodox Church ceremonies.

• The first winery of modern ages was opened in 1885 and is today the largest winery in Southeast Europe.

• While part of Yugoslavia, Macedonia was a major producer of wine, accounting for 2/3 of the Yugoslav production.
MACEDONIAN VITICULTURE
History and Tradition

Krater
(A bronze vessel used for alleviating wine by adding water)
hight: 81,5cm / width 44,5cm
Archeological site: Trebenishte-Ohrid, R. Macedonia
VI-V Century BC
MACEDONIAN VITICULTURE
History and Tradition

• In the 60s and the 70s – 14,000 ha
• Stanushina, Prokupec, Vranec, Kratoshija, Smederevka, Zilavka
• Quantity vs. Quality
• 1981 – 39,000 ha
MACEDONIAN VITICULTURE
Today

• Vineyards Area (2013): 33.500 ha
• Wine varieties 24 777 ha
  70% wine varieties
  30% table grape varieties
  50% red and 50% white varieties
According to the climate characteristics and classification of the EU, Macedonia is considered as zone III-C-b for growing grapevine and adopts the oenological rules, relating to this zone. The main feature of this zone is that the wines can have acidification, but not to enrich, which corresponds to the current legislation and practice of wine production in the country.
MACEDONIAN WINE INDUSTRY
Terroir

• Land of **TIMELESS SUN**
  - 270 sunny days (8 hours)
  -40 °C (104° F)

• Transitional Climate
  - Mediterranean to Continental

• Annual Precipitation
  - 500-1700 mm
  - Driest Region in Balkans

• Rich and fertile soil
  - Minerals and carbonates
MACEDONIAN WINE INDUSTRY
Wine regions

- Three Wine Regions
  1. Pcinja – Osogovo (Eastern)
  2. Vardar River Valley (Central)
  3. Pelagoniya – Polog (Western)

- Sixteen Wine Districts
MACEDONIAN WINE INDUSTRY
Grape Varieties

- **Macedonian Reds**
  - Vranec
  - Kratosija
  - Stranushina
  - Prokupec
  - Ohridsko Crno

- **Macedonian Whites**
  - Temjanika
  - Smederevka
  - Zilavka
  - Zupjanka

- **International Reds/Whites**
  - Cabernet Sauvignon
  - Merlot
  - Pinot Noir
  - Syrah
  - Chardonnay
  - Sauvignon Blanc
  - Rkaciteli
MACEDONIAN WINE INDUSTRY
Facts and Figures

• Economic Impact: 17-20% of Agriculture GDP
• Second largest Sub-Sector After Tobacco
• Number of Registered Wineries (2013): 81 (28 in 2003)
• Diversified Structure:
  - 90% below 50,000 hl
  - 5 wineries with capacity from 50,000-150,000 hl
  - 4 wineries with capacity from 150,000-500,000 hl
• Domestic Consumption: 9-10 mil liters per annum
• Export Oriented Wineries
  - Improvement in the quality of grape production
  - Significant investment in advanced technology
## Top 10 export destination in 2013

### Bottled Wine

<table>
<thead>
<tr>
<th>Country</th>
<th>Volume in L</th>
<th>Value in EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serbia</td>
<td>5,449,400</td>
<td>6,550,457</td>
</tr>
<tr>
<td>Germany</td>
<td>3,434,000</td>
<td>1,846,009</td>
</tr>
<tr>
<td>Croatia</td>
<td>1,881,800</td>
<td>2,143,463</td>
</tr>
<tr>
<td>Slovenia</td>
<td>1,718,500</td>
<td>1,049,588</td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>1,053,500</td>
<td>1,383,591</td>
</tr>
<tr>
<td>Montenegro</td>
<td>529,300</td>
<td>575,514</td>
</tr>
<tr>
<td>Russia</td>
<td>494,800</td>
<td>508,280</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>493,800</td>
<td>429,491</td>
</tr>
<tr>
<td>China</td>
<td>432,300</td>
<td>766,926</td>
</tr>
<tr>
<td>Canada</td>
<td>360,500</td>
<td>239,765</td>
</tr>
</tbody>
</table>

### Bulk Wine

<table>
<thead>
<tr>
<th>Country</th>
<th>Volume in L</th>
<th>Value in EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>34,336,800</td>
<td>14,083,069</td>
</tr>
<tr>
<td>Serbia</td>
<td>15,604,700</td>
<td>6,783,044</td>
</tr>
<tr>
<td>Croatia</td>
<td>6,447,600</td>
<td>4,420,682</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>3,443,800</td>
<td>1,955,693</td>
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<tr>
<td>Slovakia</td>
<td>3,262,900</td>
<td>1,388,418</td>
</tr>
<tr>
<td>Romania</td>
<td>1,837,100</td>
<td>801,196</td>
</tr>
<tr>
<td>Slovenia</td>
<td>1,702,800</td>
<td>961,671</td>
</tr>
<tr>
<td>Russia</td>
<td>1,394,400</td>
<td>563,562</td>
</tr>
<tr>
<td>China</td>
<td>679,000</td>
<td>325,061</td>
</tr>
<tr>
<td>Japan</td>
<td>522,600</td>
<td>277,108</td>
</tr>
</tbody>
</table>
Wine legislation

• The legal framework - wine sector is regulated by the Wine Law (Official Gazette no. 50/10)

• In order to improve the functionality of the Wine Law were adopted and its amendments (Official Gazette No. 53/11, 06/12, 23/3, 106/13 and 188/13).
Wine legislation

• areas of enological means and procedures applied in the manufacture of wine
• the methods of analysis
• the classification of varieties of grapes for wine production
• the conditions of production wine
• format, content, dimensions and other information on the label
Wine legislation

• the content and form of the accompanying document and the input and output registers for products of grapes and wine, as well as geographical areas planted with vines to protect the geographical origin of the wine in the country

• the list of protected names of wines labeled with geographical indication rules concerning the labeling of their product areas
Benefits of the Wine Law

• The previous Law on wine was adopted in 2004 (Official Gazette No.69 / 2004 and 89/2008) and has undergone some changes in 2008.

• In its application, and especially on the reform of the Wine Low in EU in 2008 was the need to adopt a new law to comply with the new EU regulation for wine 479/2008.
Benefits of the Wine Law

• The Law on Wine specify the more important issues that were not regulated by the previous Wine Law
• the manner of keeping the National Register of vineyards
• approved and prohibited oenological means and procedures
• the procedure for placing the wine in trade
• import and export of wine, as well as certain rules on production, labeling and protection of wines with geographical name.
Benefits of the Wine Law

• The description and labeling are fully compliant with the rules for labeling applicable to the European Union.

• The classification of wines according to quality is closely related to their geographical origin. Thus the law encourages the production and promotion of wines with geographical name. The use of geographical indications contribute to strengthening the awareness of unity between wine producers and improve the image of Macedonian wine.
THANKS FOR ATTENTION!