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ANALYSIS OF WINE SECTOR PRODUCTION, WITH A COMPARATIVE OVERVIEW OF CONVENTIONAL AND ORGANIC PRODUCTION IN THE WESTERN BALKANS

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TABLE OF CONTENTS

1.	GRAPE PRODUCTION	**3**
1.1.	Total area under vineyards	**3**
1.2.	Vineyards in the process of conversion to organic production	**4**
1.3.	Area under vineyards in the process of organic certification	**5**
1.4.	Total quantity of produced grapes	**6**
1.5.	Quantity of produced grapes in the conversion process	**7**
1.6.	Quantity of produced certified organic grapes	**8**
2.	WINE PRODUCTION	**9**
2.1.	Total quantity of produced wine	**9**
2.2.	Quantity of produced organic wine	**10**
3.	CONCLUSION	**11**

1. GRAPE PRODUCTION

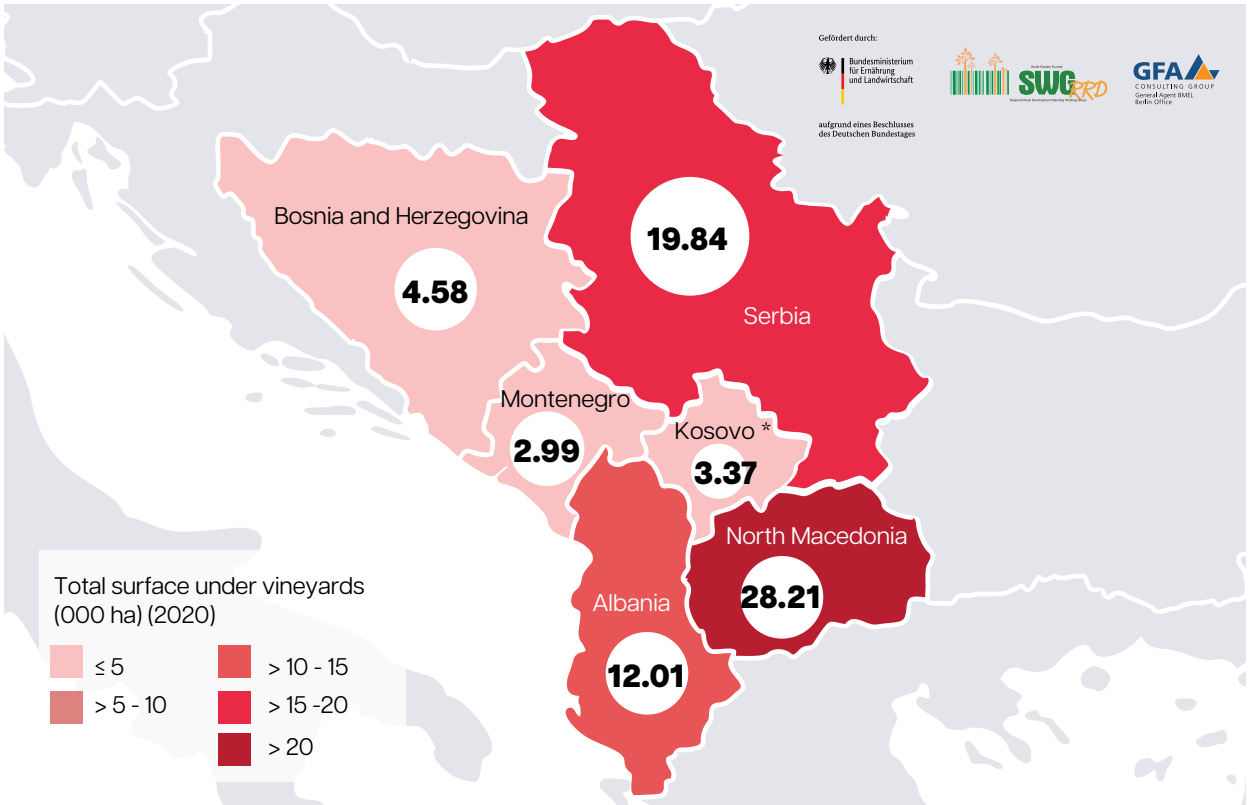
1.1 Total area under vineyards

The total area under vineyards in the Western Balkan region is 71,004 ha. The largest wine producer in the Western Balkans is North Macedonia with an area under vineyards of 28,213 ha in 2020. The area under vineyards in North Macedonia represents about 40% of the total area under vineyards in all Western Balkan countries/territories (Table 1). Serbia comes second in terms of total area under vineyards with 19,840 ha, which represents around 28% of the total analyzed area under vineyards in the region (Map 1).

Table 1. Total surface under vineyards (ha)

Country/Territory	2017	2018	2019	2020
Albania	10,057	10,787	10,842	12,007
Bosnia and Herzegovina	4,583	4,585	4,582	4,583
Kosovo*	3,190	3,279	3,271	3,369
Montenegro	2,966	2,955	2,992	2,992
North Macedonia	24,772	24,772	24,772	28,213
Serbia	21,201	20,333	20,501	19,840

Map 1. Total area under vineyards (000 ha) (2020)



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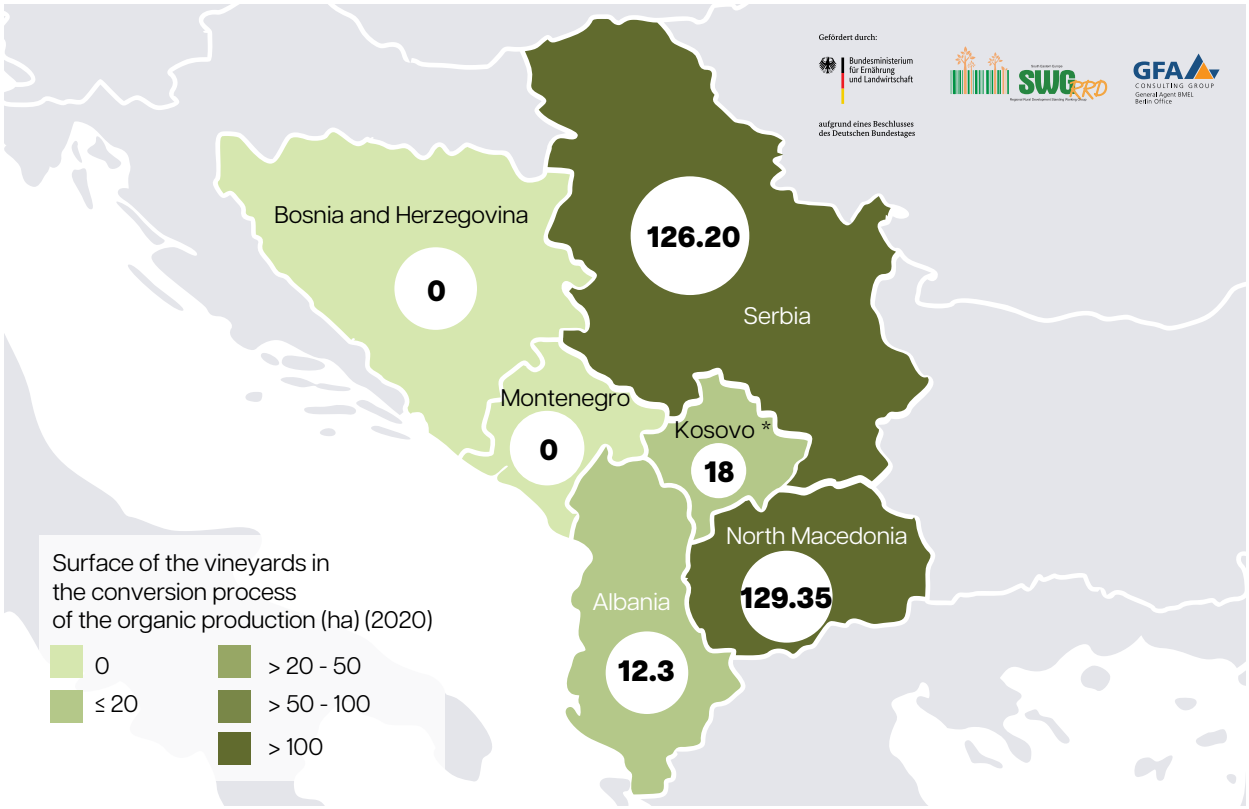
1.2 Vineyards in the process of conversion to organic production

First step in acquiring organic grape and wine production is to meet the conditions in terms of conversion from conventional to organic grape and wine production. The conversion process is the most significant in North Macedonia, which in 2020 had 129.35 ha in the process of conversion (0,46% of the total area under vineyards) (Table 2). With 126.20 ha of vineyards in the process of conversion to organic production (0,64% of the total vineyards area), Serbia also has significant organic production (Map 2).

Table 2. Area under vineyards in the process of conversion to organic production (ha)

Country/Territory	2017	2018	2019	2020
Albania	0	0	4.5	12.3
Bosnia and Herzegovina	0	0	0	0
Kosovo*	0	0	0	18
Montenegro	0	0	0	0
North Macedonia	9.03	95.22	124.01	129.35
Serbia	11.53	34.13	41.47	126.20

Map 2. Area under vineyards in the process of conversion to organic production (ha) (2020)



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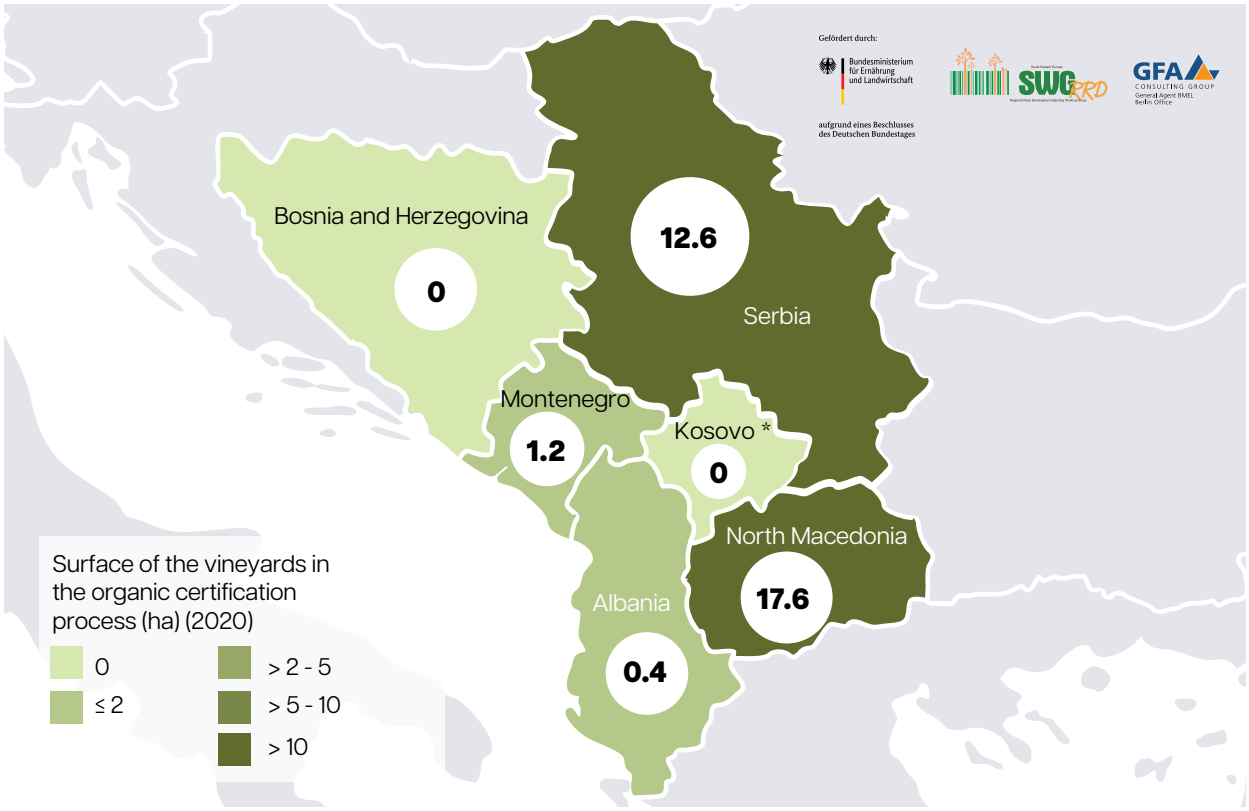
1.3 Area under vineyards in the process of organic certification

In terms of certified organic vineyards, the areas are unsatisfactory. North Macedonia and Serbia are the only ones with more than 10 ha each in 2020, and smaller areas have been certified in Montenegro and Albania (Table 3, Map 3). There are no areas under vineyards in the process of organic certification in Bosnia and Herzegovina and Kosovo*.

Table 3. Area under vineyards in the process of organic certification (ha)

Country/Territory	2017	2018	2019	2020
Albania	0	0	0	0.4
Bosnia and Herzegovina	0	0	0	0
Kosovo*	0	0	0	0
Montenegro	0.5	1.2	1.2	1.2
North Macedonia	15.0	20.1	15.8	17.6
Serbia	11.5	8.6	10.7	12.6

Map 3. Area under vineyards in the process of organic certification (ha) (2020)



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1.4 Total quantity of produced grapes

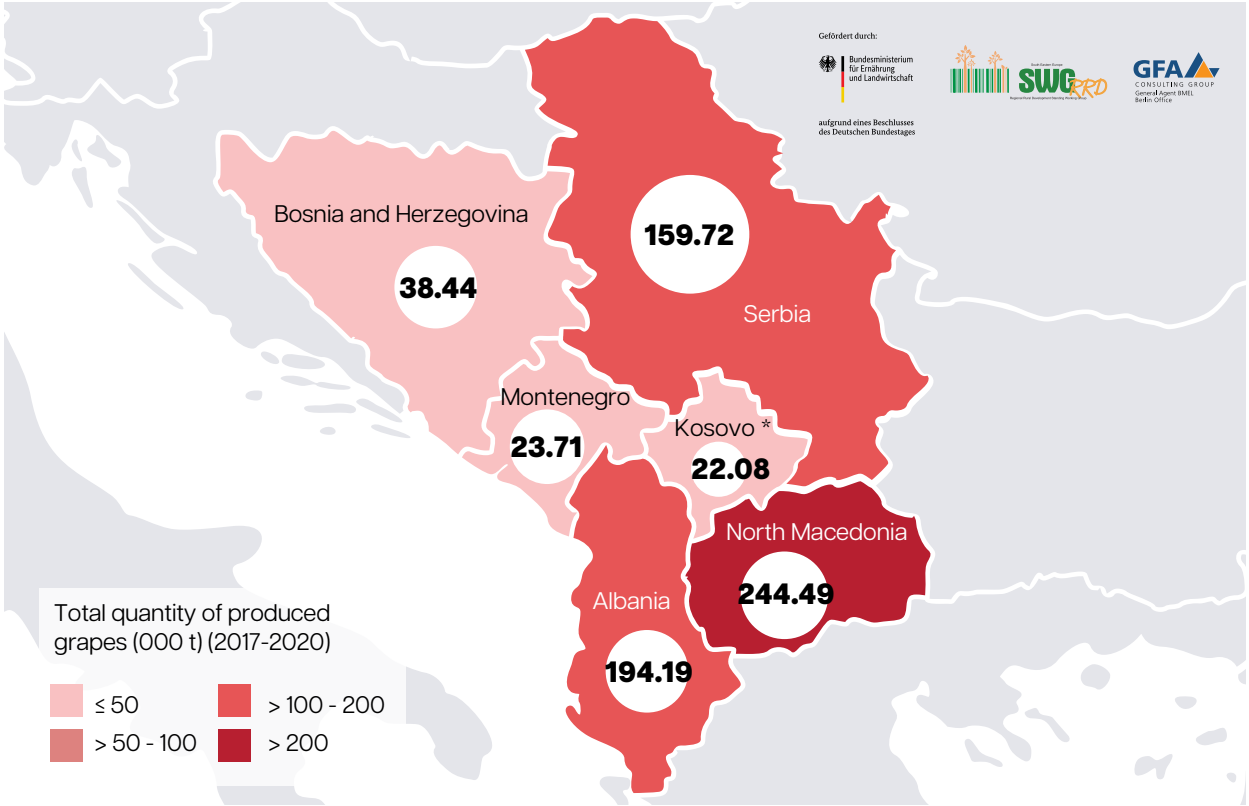
North Macedonia had the largest production of grapes in the period 2017-2020 (Table 4). Namely, out of the total average annual grape production of 682,632,429 kg (2017-2020), about 36% of grape production is in this SWG member. Other countries/territories of the Western Balkans have regular annual yields of over 438 million kilograms (Map 4).

Table 4. Total quantity of produced grapes (kg)

Country/Territory	2017	2018	2019	2020	Average (2017-2020)
Albania	202,948,000	184,832,000	189,900,000	199,100,000	194,195,000
Bosnia and Herzegovina	28,014,000	40,247,000	39,681,000	45,811,000	38,438,250
Kosovo*	15,364,000	27,322,000	19,318,000	26,330,383	22,083,596
Montenegro	23,480,000	25,774,000	21,865,000	*23,706,333***	23,706,333
North Macedonia	180,349,000	294,500,000	258,960,000	*244,603,000***	244,488,000
Serbia	165,568,000	149,474,000	163,536,000	160,307,000	159,721,250

***Average (2017-2019)*

Map 4. Total quantity of produced grapes (000 t) (2017-2020)



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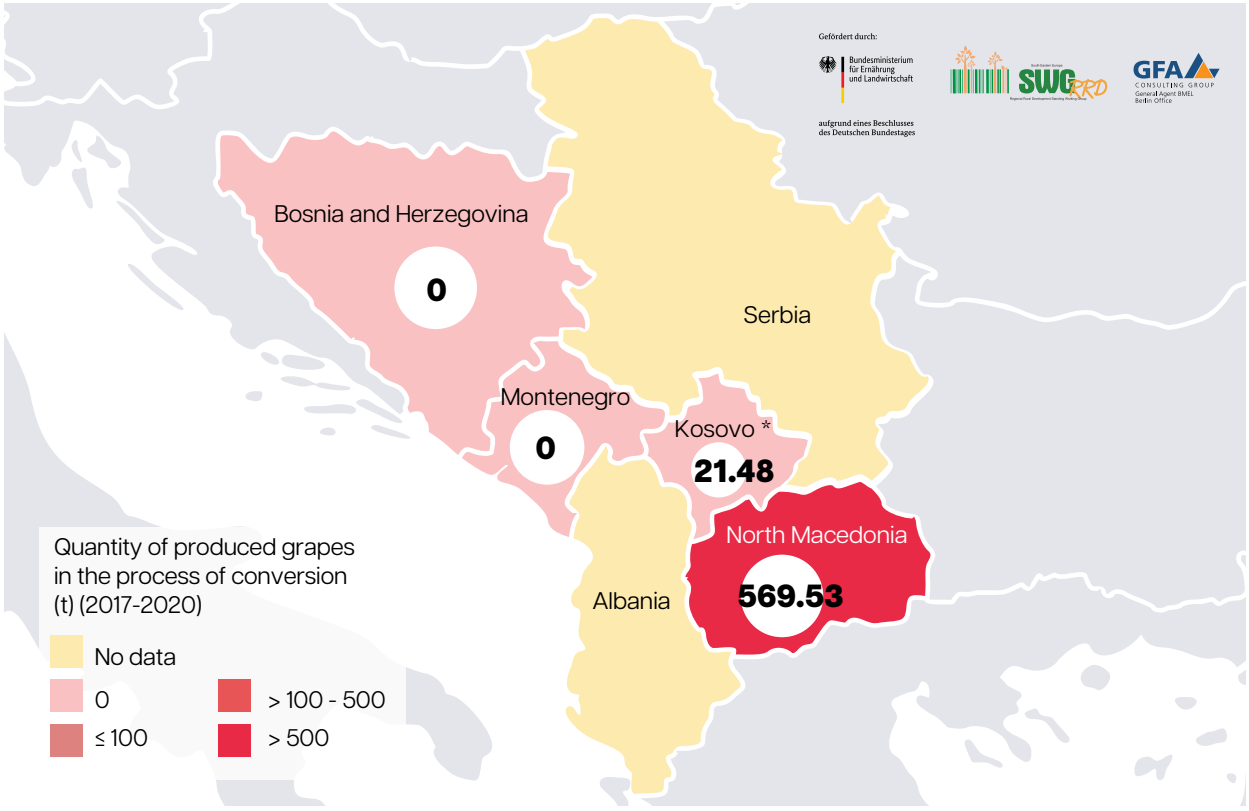
1.5 Quantity of produced grapes in the conversion process

According to available data, only North Macedonia and Kosovo* had grape production in 2020 in the process of conversion from conventional to organic production (Table 5). North Macedonia had an average annual grape production in the process of conversion of 569,534 kg (2017-2020) (Map 5).

Table 5. Quantity of produced grapes in the process of conversion (kg)

Country/Territory	2017	2018	2019	2020	Average (2017-2020)
Albania	ND	ND	ND	ND	ND
Bosnia and Herzegovina	0	0	0	0	0
Kosovo*	0	0	0	21,479	21,479
Montenegro	0	0	0	0	0
North Macedonia	81,000	855,000	1,116,000	1,161,200	569,534
Serbia	ND	ND	ND	ND	ND

Map 5. Quantity of produced grapes in the process of conversion (t) (2017-2020)



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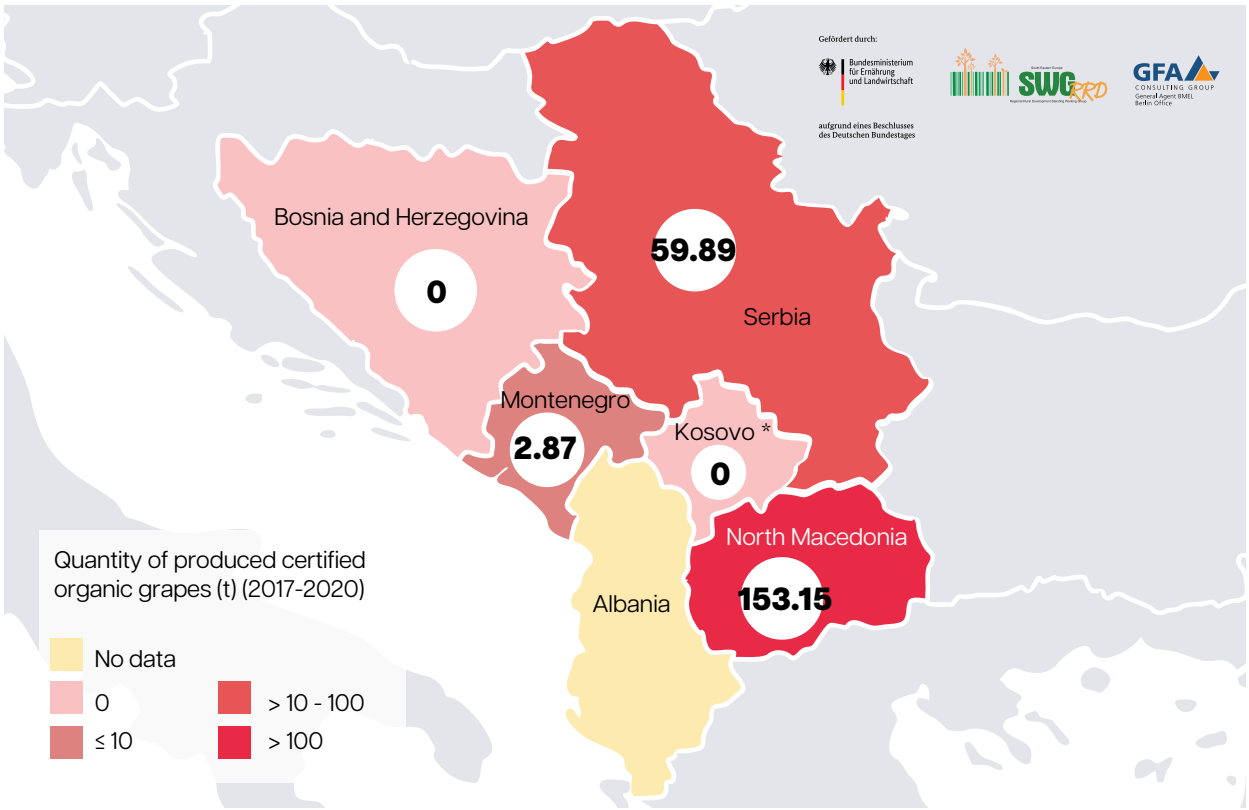
1.6 Quantity of produced certified organic grapes

Regarding the production of certified organic grapes, North Macedonia is the leading country in the region (Table 6). The average annual amount of certified organic grapes in North Macedonia was 153,150 (2017-2020), which is 0.063% of the total amount of produced grapes in this SWG member. Serbia also had significant average annual production of organic grapes (59,888 kg), which is 0.037% in relation to the total grape production of this SWG member (annual average production in the period 2017-2020) (Map 6).

Table 6. Quantity of produced certified organic grapes (kg)

Country/Territory	2017	2018	2019	2020	Average (2017-2020)
Albania	ND	ND	ND	ND	ND
Bosnia and Herzegovina	0	0	0	0	0
Kosovo*	0	0	0	0	0
Montenegro	2,000	2,000	3,500	4,000	2,875
North Macedonia	135,000	180,000	135,600	162,000	153,150
Serbia	39,150	64,580	63,920	71,900	59,888

Map 6. Quantity of produced certified organic grapes (t) (2017-2020)



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2. WINE PRODUCTION

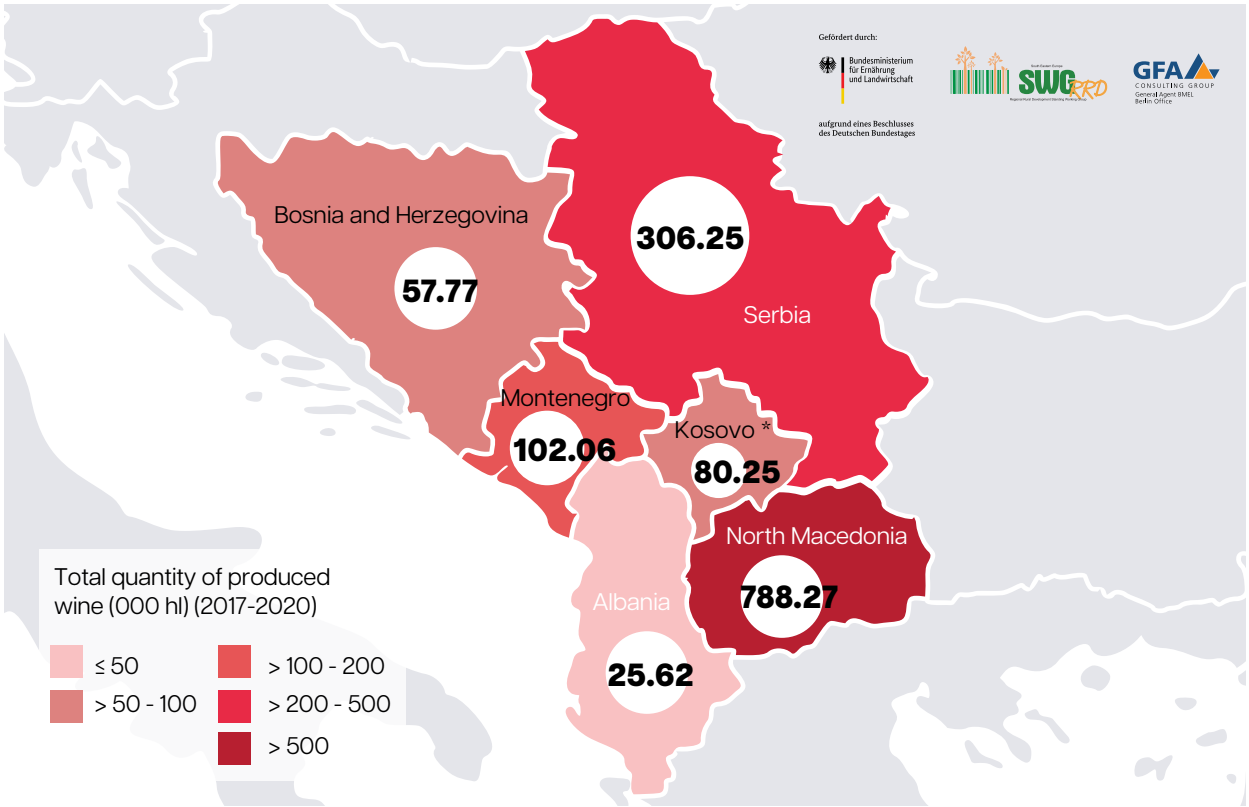
2.1 Total quantity of produced wine

Total wine production in the Western Balkans region in the period 2017-2020 was 136,023,071 l. The largest wine producer is North Macedonia with 78,827,017 l of wine produced, accounting for about 58% of the total wine production in the region. Serbia comes second in terms of wine production with 30,625,000 l of produced wine, which is about 23% of the total wine production in the region in the period 2017-2020 (Table 7, Map 7).

Table 7. Total quantity of produced wine (l)

Country/Territory	2017	2018	2019	2020	Average (2017-2020)
Albania	2,456,000	2,680,000	2,512,900	2,600,200	2,562,300
Bosnia and Herzegovina	5,965,600	5,953,200	5,766,000	5,425,200	5,777,500
Kosovo*	5,304,795	11,744,188	5,754,341	9,297,891	8,025,304
Montenegro	9,923,400	10,986,600	10,143,300	9,770,500	10,205,950
North Macedonia	78,390,325	79,704,998	82,800,764	74,411,980	78,827,017
Serbia	37,500,000	33,100,000	27,900,000	24,000,000	30,625,000

Map 7. Total quantity of produced wine (000 hl) (2017-2020)



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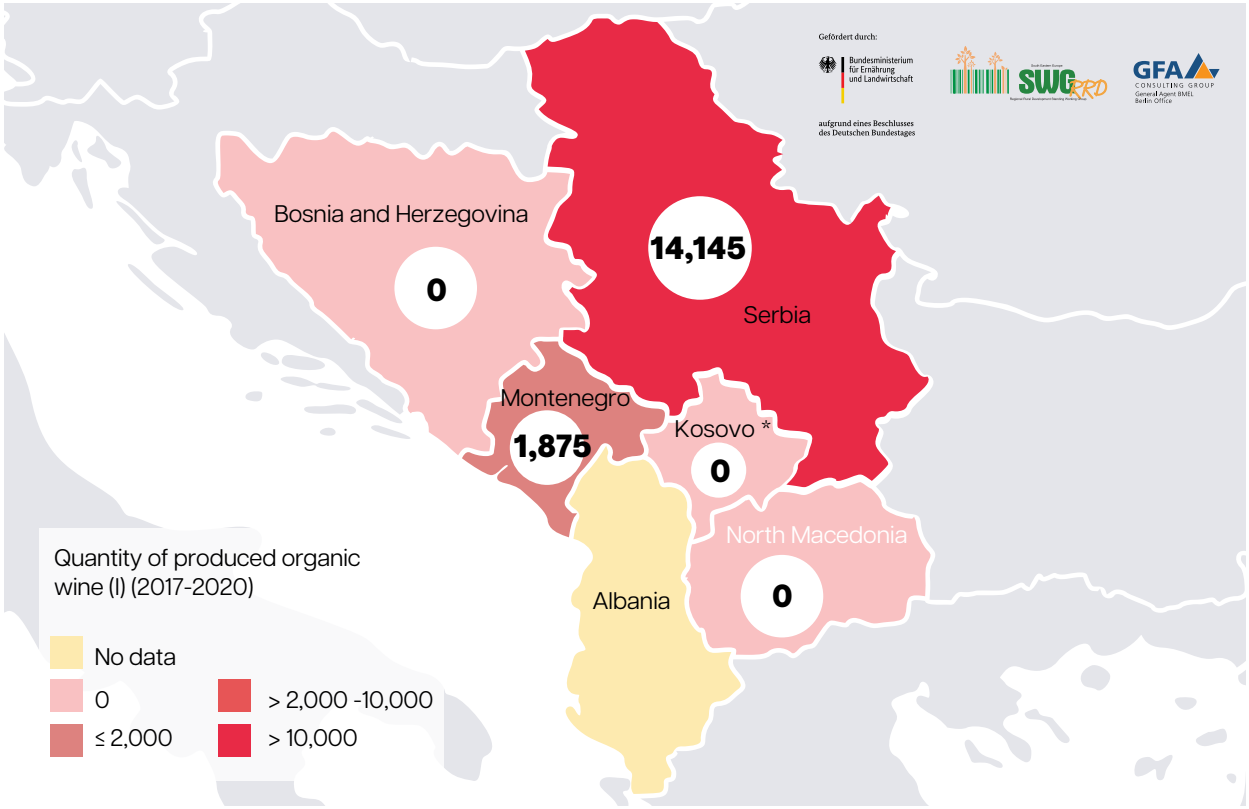
2.2 Quantity of produced organic wine

Certified organic wine production is symbolically represented in the countries/territories of the Western Balkans. The average annual production of organic wine (period 2017-2020) was 16,020 litres, which is only 0.012% of the total annual average wine production in the Western Balkans. Only Serbia and Montenegro had certified production of organic wine, Serbia on average 14,145 l, and Montenegro on average 1,875 l (2017-2020) (Table 8, Map 8).

Table 8. Quantity of produced organic wine (l)

Country/Territory	2017	2018	2019	2020	Average (2017-2020)
Albania	ND	ND	ND	ND	ND
Bosnia and Herzegovina	0	0	0	0	0
Kosovo*	0	0	0	0	0
Montenegro	1,300	1,300	2,300	2,600	1,875
North Macedonia	0	0	0	0	0
Serbia	6,820	0	0	21,470	14,145

Map 8. Quantity of produced organic wine (l) (2017-2020)



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The leading wine-growing areas in terms of organic grape production in North Macedonia are Tikvesh, Veles, and Skopje wine-growing regions, in Serbia Srem and Beograd wine-growing regions, in Montenegro Podgorica wine-growing region, and in Kosovo* Rahovec/Orahovac wine-growing subregion.

The leading wine varieties that vineyards are in the process of organic production certification and that are used for the production of organic wine are, in North Macedonia: Vranec, Smederevka and Tamjanika, in Serbia: Chardonnay, Sauvignon, Tamjanika, Panonia and Regent, in Montenegro: Vranac and Kratošija, and in Kosovo*: Syrah, Traminer and Pinot Blanc.

3. CONCLUSION

Although there is great potential for the production of organic grapes and wine in the Western Balkans, so far these opportunities have not been used much. The area under organic vineyards, as well as the production of organic grapes and wine is symbolic. For this reason, it is necessary to actively promote organic grape and wine production in all countries/territories of the Western Balkans.

In order to more intensively develop organic grape and wine production in the region and strengthen capacities in the process of certification of organic grape and wine, it is proposed to develop guidelines that would cover all aspects of organic grape and wine production relevant to all countries/territories in the Western Balkans. The data in this analysis can certainly be used in the proposed guidelines.

Also, it is proposed to enhance knowledge on organic production of grapes and wine among the participants within the project Facilitation of Exchange and Advice on Wine Regulations in the Western Balkans.

Annex: Proposed general structure of the guidelines on organic grape and wine production

Chapters:

- General information on the viticulture and winemaking sector and organic production
- Legislation on viticulture and winemaking and organic production sectors
- Abiotic and anthropogenic *terroir* factors in the production of organic grapes and wine
- Preparation and arrangement of plots for planting organic vineyards
- Organic viticulture and suitable grape varieties for organic production
- Quality and harvesting of organic grapes
- Grape processing and organic wine production
- Labelling and presentation of organic wines
- Certification of organic grape and wine production
- Marketing and promotion of organic grapes and wine
- Organic grape and wine producers in the Western Balkans and organic wines
- SWOT analysis of organic grape and wine production in the Western Balkans, conclusions and recommendations
- Annex: Maps of wine-growing areas and potential wine-growing sites

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