



# **Study on WINE Tourism** in the **REPUBLIC OF NORTH MACEDONIA**

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## FOREWORD

Wine tourism is a specific type of tourism worldwide, which is constantly growing and represents a significant part of the tourist offer of many countries, most of them countries with a tradition of wine production, but also of countries that have started this activity in recent decades. This study analyses the potentials of wineries and the degree of development of wine tourism in the wine regions of the Republic of North Macedonia, in order to see the prospects for the future development of wine tourism in the country. The research has identified the existing state of wine tourism in the country through wineries that offer tourist tasting, and this document improves insufficient awareness of the potential of wine tourism and covers in part its promotion. The study at the same time opens the possibility for new investments in our country for this type of tourism by choosing locations for construction of new wine centres.

The main objective of this study is the tourism valorisation of wine regions and wine tourism, as well as analysis of wineries that offer tasting for tourists and the ways and measures for their better inclusion in the tourist offer of the country when designing the wine tourism product. Specific objective of the study is to map, photograph and single out wine regions and wineries as potential tourist attractions, with suggestions for future locations for construction of new wine centres.

The study, in addition to the tourism valorisation of wine tourism, provides measures and recommendations for further activities related to the successful development of wine tourism, such as promotion of wineries, alignment and enhancement of the legislation related to wine tourism and placement of appropriate tourism signalisation in the wine regions.



## INTRODUCTION

Tourism is a sector that is a “success story” and has seen steady growth over the past decades, resulting in increase in the number of tourists and overnight stays worldwide. According to data from the United Nations World Tourism Organisation (UNWTO), tourist arrivals in 2018 internationally have reached 1,400 million. Tourism spending totalled USD 1,700 billion, with the tourism industry accounting for 10% of global GDP. Every tenth person in the world is employed in this sector.

Predictions for the future development of tourism are in the positive direction, the primacy as the most developed tourist region in the world in the coming period will occupy the European continent, including the Republic of North Macedonia. The economic benefits created by tourism can also be felt daily in the Republic of North Macedonia. The activities undertaken by the Ministry of Economy and the Sector for Tourism and Catering, in order to create positive conditions for tourism in the country in the past years are one of the most crucial factors for the development of this sector in the country’s economy. In recent years, the Republic of North Macedonia has seen a steady increase in the number of tourists and overnight stays. Thus, in 2018, the number of tourists is 1,126,935, of which 37.2% are domestic tourists and 62.8% are international tourists. The number of overnight stays in 2018 is 3,176,808, 53% of which are domestic tourists and about 47% are international tourists.

Wine tourism (visiting wineries, vineyards, tasting, wine ways, museums, events etc.) is one of the types of tourism that has a significant share in contemporary global trends. A review of relevant contemporary tourism related literature for the purpose of this study has shown that there are more authors internationally dealing with wine tourism and publishing professional literature in this field in different countries. For this reason, the study uses international experiences and data related to the world wine markets, as well as the most developed wine regions in countries where wine tourism is an important segment.

Wine tourism in the Republic of North Macedonia has been on the rise lately, and wineries in the wine regions are building capacities designed to better serve tourists. There are three wine regions in the country, with 28 wineries offering wine tasting, some offering catering services (accommodation, nutrition), additional services such as sightseeing, walking, conference facilities and the like. Various wine theme events are organised in the wine regions, there are wine shops, wine museums and wine roads.

Taking into consideration the modern needs of the tourists in the segment of wine culture acquaintance, wine regions visit, wine tasting and combining with local gastronomy, as well as the increased demand in this sector, in the 2019 Annual Tourism Development Programme of the Republic of North Macedonia, drafted by the Ministry of Economy, preparation of a study on wine tourism in the Republic of North Macedonia is included as a tourist destination. Main objective of this study is to prepare tourist valorisation of unused facilities owned by the Republic of North Macedonia in the eight planning regions, as well as the manners and measures for their inclusion in the tourist offer and promotion thereof. Main objective of the study is the tourist valorisation of spa resorts and the manners and measures for their inclusion in the tourist offer by improving the promotion, harmonisation of the legislation, tourist signalling and making proposals for future locations for the construction of new wine centres.

The study analyzes the world trends in wine tourism and gives a statistical overview of wine related data in the world, as well as the most famous regions of the world where there is developed wine tourism. World trends show a general increase in wine tourism participants, and thus revenue in the countries in which it is developed. It certainly attracts the attention of international tourism organizations and tourism policy makers at the national level in devising strategies for developing and promoting wine tourism.



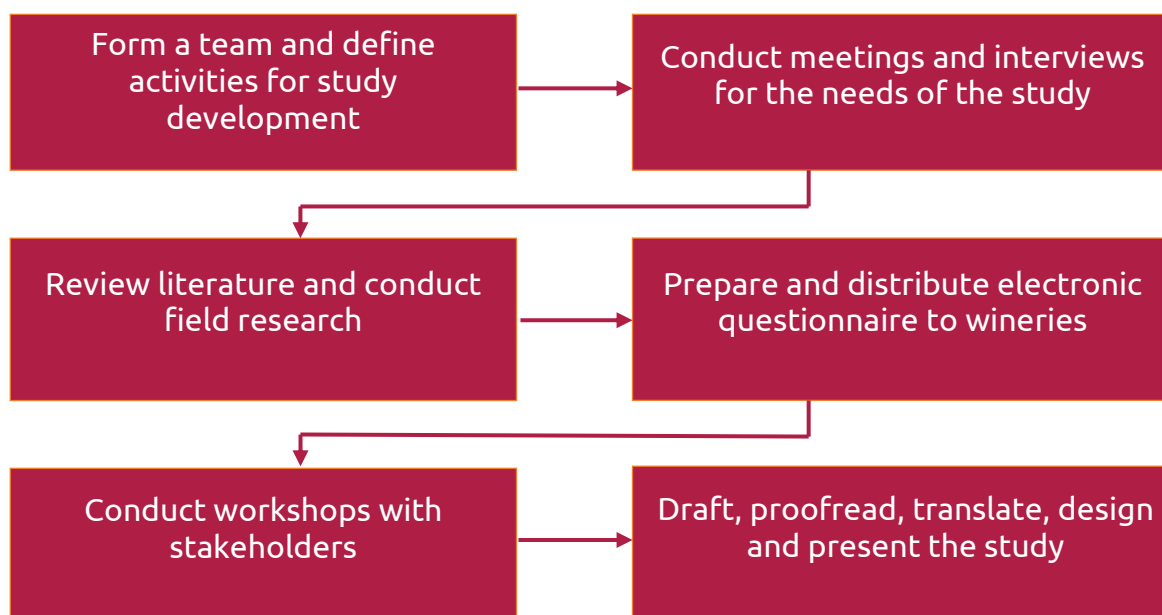
World examples of the importance of wine events, fairs and museums as part of the wine tourism offer, the way they are valorized, their role in the overall promotion of wine tourism and etc., can be an important roadmap for tourism development in the Republic of North Macedonia and a foundation for development of regional and national strategies. The statistics related to the winery processed in the Study will give an idea of its development in the world, but will also help determine the place of the Republic of North Macedonia on the world wine map. In the continuation of the Study, an analysis of international experiences related to wine tourism and world-famous wine regions is made, in order to make a comparison that will show the country's capacities for development of wine tourism, possibilities for taking future steps and activities in the interest of development of the same.

## METHODOLOGICAL FRAME OF STUDY DEVELOPMENT

The purpose of this study is to conduct analysis, mapping, and tourism valorisation of wine tourism through wineries that offer tasting and additional services to tourists in the Republic of North Macedonia. For the purpose of the study, an appropriate methodology has been used which derives from specific objectives, namely positioning wineries and wine regions as tourist attractions, promoting them, aligning legislation, and presenting potential locations for construction of new wine centres.

The study of wine tourism in the Republic of North Macedonia is an important document that highlights the potentials and opportunities for wine tourism development in the country thereof. In addition to tasting wineries, the study also analyses wine events, wine routes, wine shops, and wine museums. The steps undertaken in the study development and the activities performed are as follows: Form a team and define activities for study development; Conduct meetings and interviews for the needs of the study (Ministries, municipalities, NGOs, wineries); Review literature and conduct field research; Prepare and distribute electronic questionnaire to wineries offering tasting; Conduct workshops with stakeholders; and draft, proofread, translate, design and present the study.

**Chart 1.** Steps in the study development



Various research methods and instruments have been used in the design of the study, such as: analysis of the content of European and global studies related to wine tourism and wine production; analysis of the legislation related to tourism, catering and wine production; analysis of statistical reports related to catering and tourism; qualitative research (workshops with winery representatives); conducting unstructured interviews with representatives of local self-government, wineries, Ministries, Wine Association; creative thinking; field research of existing wineries and wine regions by photographing and visiting potential wine centres locations; visiting wine museums and wine events; desk analysis of relevant literature, bibliography and internet sources; cartographic analysis and mapping of wineries and regions; design, distribution and analysis of electronic questionnaire to wineries offering wine tasting etc.

The study was developed in accordance with the existing tourism policy in our country, consulting corresponding plans, programmes, and strategies at national, regional, and local levels, as well as the existing legislation.

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The primary data collected through the research associated with this study come from the electronic questionnaire and field surveys. Also, the meetings and workshops, as well as the unstructured (non-formal) interviews, led to the collection of data that helped in the preparation of the questionnaire. For the needs of the study, a workshop was held with representatives of the wineries and the Wine Association explaining the study objectives. At this workshop, the wineries made their recommendations, which were further integrated in the wine tourism study. The attached electronic questionnaire was used as a basis for collecting data on the wineries offering tasting and was uploaded to the google drive electronic platform with a brief explanation of the study objectives. It contained 16 questions and was sent electronically to the wineries and successfully answered by them. On the basis of the questionnaires answered and the data obtained from the wineries, the study included 28 wineries that offer wine tasting from the three wine regions in the country. The field research was carried out by the research team over several months. Visits to wineries, wine museums and events, wine regions and potential wine centres' locations were photographed. Through field research, it was possible to directly collect real-time data on the current state, tourist facilities and traffic connectivity of wineries and wine regions, as well as to visit the natural and cultural values surrounding the objects of interest for wine tourism.

Secondary data sources have been used for the purpose of the study by consulting relevant literature in the field of tourism and wine production, as well as the web. Using the web, materials such as national tourism development strategies and sub-strategies, regional and municipal development programmes, laws that are directly and indirectly related to tourism and wine production were analysed in the research for the purposes of this study. The main method used in secondary research is content analysis. Content analysis is a research method used to systematically evaluate the content of the phenomenon being explored, and in our case the content of legislation and strategic documents, as well as the tourism potential of wine regions and wineries.

During the entire process of study development, several coordination meetings were held with representatives of the Ministry of Economy - Sector for Tourism and Catering, where the representatives of the Ministry were acquainted with the current and future activities related to the study of wine tourism, so that they would provide recommendations and guidelines for successful implementation of the research.



# I. GLOBAL TRENDS IN WINE TOURISM

Wine tourism is a visit and stay in wine regions, wine tasting, wine events, wine museums and wine shops. It is directly related to wine consumption and is part of the wine culture. In this chapter of the study, the material related to the characteristics of wine tourism, world wine-related statistics and the world's most famous wine tourism developing regions is elaborated.

## 1. Characteristics of wine tourism

There are no universal definitions of wine tourism in the literature, and this term has been treated by many authors and organisations, hence defining it in various respects. Wine tourism is also referred to by some authors as wine tourism. Wine tourism is a set of interactive processes, phenomena and relationships that arise from the interest of visitors to the production and/or consumption of wine as a style, lifestyle, culture, and tradition of a particular wine region. Many definitions of wine tourism refer to the experiences and motives of tourists. According to them, wine tourism is a visit to wine regions, vineyards, tastings, wineries, wine festivals and exhibitions that are organised for relaxation purposes. There are mainly three main carriers of wine tourism: the wine maker, the consumer tourist and the travel agency promoting the destination. Other research, however, points to the fact that vine cultivation and wine production technology are directly linked to cultural heritage, with wine tourism having similar characteristics to cultural tourism, since tourists who participate in wine tourism and gastronomy and are direct participants in cultural tourism.



By developing wine tourism, the tourism in the destination is being developed, especially in rural areas, by increasing wine sales, building a positive image of the destination, and increasing the number of tourists. The development of wine tourism also depends on the state's tourism policy and strategies and development programmes, destination marketing, tourism organisations and the private sector. The benefits of wine tourism development have several stakeholders in the tourism market, such as:

**Wine industry** through:

- » Increasing the wine sales;
- » Education of winery and wine region visitors;

- » Attracting new market segments;
- » Generating higher incomes;
- » Creating new business cooperation;
- » Possibility for creation of new products.

#### **Destination** through:

- » Increasing the number of tourists, their demand and consumption;
- » Developing positive image of the destination;
- » Attracting new and retaining existing tourists.

#### **Local community** through

- » Attracting new investments;
- » Developing new service and entertainment contents;
- » Creating positive image for the region;
- » Organising events;
- » Employing local population;
- » Overall region development

Demand in wine tourism consists of a variety of motives, experiences, perceptions, and expectations that change depending on the needs of potential customers. The motives range from buying good wine, to educating oneself on the manner of production, enjoying walks in the nature, getting to know local food, and more. Research shows that the average wine tourists are highly educated at the age of 45-60 and is economically independent. Their goal is not only to taste wine, but also to get to know other people, their culture and history.

The literature defines four types of wine tourists:

- » A professional, a person who knows the oenology, discusses details, and precisely determines the wine qualities;
- » Impressive beginner, wine loving person, enjoying food, traveling with friends;
- » Bohemian, a person with high paying power, who achieves social status through the wine, has basic knowledge, loves well-known brands;
- » An alcoholic, a person who regularly visits wineries, drinks massive quantities of wine but does not enjoy it.

The wine tourist offer is a combination of wineries, wine routes, destination as an attraction, its image, etc. But just one product - wine - is not enough to complete the offer, but other forms of development such as rural tourism, religious tourism, cultural tourism, etc., are rather needed. The wine tourism product itself should contain elements from different carriers and only as such can it be marketed as a successful tourism story. The table below shows the typology of wine tourism products.

**Table 1.** Typology of wine tourism products

Typology of products	Description of products
<b>Wine routes</b>	Marking wine regions for visiting vineyards and wineries
<b>Promenade in vineyards</b>	Marked itineraries enable disclosure of vineyards through hiking and sightseeing
<b>Studying oenology</b>	Courses for acquainting marketing of wine tourism, culture, tradition, and production technology
<b>Visiting wine cells</b>	Acquainting wine cells and wine production
<b>Wine museums</b>	Objects of culture where world achievements in wine production are presented
<b>Festivals and events</b>	Events for maintaining local tradition, wine promotion, marketing advancement and production
<b>Professional presentations, tastings, and sale actions</b>	Presentation of wines for commercial purposes

Successful examples of wine tourism development may be found all over the world. In addition to countries that are traditional wine producers, such as France, Spain, Italy, countries such as Argentina, Australia, Chile, New Zealand, and South Africa are investing heavily in wine tourism development. In South Africa, tourists visiting Cape Town have two main activities to do: visit Table Mountain National Park by funicular and visit some of the regional wine routes. The Napa Valley, a popular wine region in California, USA, is a region where only plums were produced in the past, and today it has grown into one of the most important and most visited wine regions in the world. Most tourists enjoy Napa's picturesque wine routes, numerous wineries, and restaurants. In addition to wine tasting and winery tours, Napa offers other wine-related tourist experiences: walks in vineyards, traditional mountain lunch, rest and relaxation in spa resorts, wine-reward golfing, cycling, flying with balloons, attending cultural events, eco-tourism, voluntary wine auctions, etc. Some wineries have added bird parks, picnic areas and barbeques, sightseeing of local historical heritage, and more to enhance the stay of tourists.

Research data of the World Tourism Organisation speak of increased interest in wine tourism globally, and in the developed wine countries, it represents large share of the additional earnings generated by wineries.

**Table 2.** Number of tourists and wine tourism in selected countries for 2014

Ord. No.	Country	Number of tourists that are directly motivated for participation in wine tourism, expressed in millions
1	USA	15
2	France	10
3	Italy	5
4	Spain	2.1
5	Argentina	1.5

As we may see from the table above, the greatest number of wine tourists are noted in USA and France, followed by Italy, Spain, and Argentina. Wine routes, or ways (march routes) were created in these countries, followed by tourists, and aiming at fully acquainting the tourists with the wine, but also with the specifics of the region as a natural and cultural heritage.

The immense significance that wine tourism has globally attracted the attention of the UN World Tourism Organisation, hence this organisation recently successfully organised four international conferences intended specially to wine tourism, as follows:

- » 1-st Wine Tourism Global Conference (7-9 September 2016) in Georgia
- » 2-nd Wine Tourism Global Conference (29-30 September 2017) in Argentina
- » 3-rd Wine Tourism Global Conference (6-7 September 2018) in Moldova
- » 4-th Wine Tourism Global Conference (4-6 December 2019) in Chile.

These conferences discussed the relevance of wine tourism to culture, traditions, history, wine tourism product, linking the public with the private sector in wine tourism, wine clusters, wine tourism development projects, wine tourism sustainability, the role of wine tourism in the development of the local community, etc.

## 1.1. Wine tasting in wine tourism

An important aspect of wine tourism is wine tasting, which is an integral part of the package of tourist services and is essential part of the tourist offer. Wine tasting differs from professional and expert wine tasting, since the purposes of the two wine tastings are different. The expert tastings are intended to give a professional evaluation of a specific wine, to classify them by quality of wine, to indicate the degree of quality and suitability with the category and name of a particular wine, wine tasting has a different purpose - it is a tourist service, where the main purpose is to present the wines to the tourists and to become acquainted with the organoleptic properties in a certain atmosphere and with the necessary information related to the tasting set. The facilities of the wineries, tourists visit are mainly divided into two main parts: facilities in front of the winery (where tasting takes place and additional activities such as sightseeing and relaxation) and production facilities (where the production process with machinery and equipment takes place).

Wine tasting as an essential element in the wine tourism offer has its own characteristics related to the following: wine tasting, tasting room, tasting performance and additional activities.



**Selection of wine for tasting.** The choice is made by the wine tourism organiser (company, winery, travel agency or tour operator, etc.) and is largely in balance with the demand of the clients and the tasting region. One or more wine tasting combinations are offered, which create one or more price offers. The line-up includes traditional wines from the region or winery assortments.

**Tasting room.** Wine tourism tasting rooms are not the same as professional wine tasting (lighting, humidity, noise, colours, approval, working tables), and the idea is to create a specific wine atmosphere - the interior is connected to history, wine mythology and folklore, with the vintage, the techniques and technologies of wine production and the specifics and characteristics of the winery and the cellar. Usually the hall is specially designed for the tasting of tourists or restaurant in the winery. No restaurant or canteen intended for the staff of the winery should be used.

**Tasting performance.** The tasting table is set for this occasion before the guests arrive. After occupying the seats by the guests, the tasting is led by a specialist (oenologist, technologist, sommelier, etc.). He/she first introduces tourists to the rules of tasting. He/she makes a brief explanation of the wines to be tasted. Some programmes envisage that a guest from among the wine tasting group is selected to take the role of a host. In cases where the group of tourists is very knowledgeable about wine, then professional tasting is approached. Tasting depends on the profile of the tourist group - whether they are modest wine consumers or lovers of wine culture and wine is a hobby for them. The oenologist should be prepared in a suitable scenario, depending on the clients in wine tourism. Thematic and food tastings are also organised, different dishes are served, and wine and food combinations are commented on. Tastes on "Health and Wine" may also be organised.



**Supplementary activities.** The tasting is part of the overall tourist programme. The following thematically relate to it: acquainting with the winery's offer and assortment; acquainting with the techniques and the technological process of the wine production; viewing vineyards and gaining information on them – surveillance, vine collection, etc.; wine shop and sale, etc. Sometimes, these supplementary activities are complemented with animation or folklore programmes to entertain the guests. The sightseeing of the winery is especially interesting for the tourists, if it is about wineries with long history. During a visit of a winery in Bordeaux, the winery owner, the Baron Philippine de Rothschild, told the visitors: "The wine production is a very simple business, only the first 200 years are difficult to manage".

## 1.2. Wine events

Wine events are important segment of wine tourism. More major events are the wine festivities, wine fairs and wine bazaars. Wine events are widespread throughout the world, basically organised and implemented in countries with developed wine production.

**Festivities.** Wine festivities are among the basic elements of the tourist product of the wine tourism. Knowledge about such festivities supplement the wine culture of the sommelier. Many such festivities have long-year tradition, especially in countries and regions with developed wine-making and tourist activity. The essence of such festivities are the cult of Dionysus, later Bacchus, and in Orthodoxy St. Trifun. Traditionally, St. Trifun is celebrated by vine growers in February, with activities related to pruning the vineyard. Festivities associated with wine are causing great interest and attendance, especially for international tourists. For them, such festivities have a strong positive impact, as they provide an opportunity to get acquainted with typical elements of national customs and rituals, as well as local folklore. Elements of calendar holiday customs can be used to create animation programmes for tourists, which further enrich their stay and programme.

**Wine bazaars and events.** Wine events, fairs and bazaars are also interesting element of the wine tourism offer and immense potential for attracting visitors. They are organised outdoors or indoors and to the greatest extent they serve to entertain visitors, wine tasting and sale, wine and food combining, as well as organised musical programmes to entertain visitors.

**Wine fairs.** Wine fairs are part of the promotional campaign and advertising of the wineries themselves, by simultaneously attracting many visitors and wine lovers. Fairs are usually organised in indoor or outdoor specialised fair halls and facilities for presentation through stands, where producers advertise and describe their products. These fair events are followed by tastings and a combination of food and wine, as well as reduced product prices. For exhibitors, the fair is an opportunity to promote the company's products and services, that is, various wines. From the organiser's point of view, the fair is a way of renting space, and the visitors are given the opportunity to take a look at and buy a particular product or service, in this case, getting to know wine, taste and buy wine. Wine fairs are places where wineries may enrich their contact base and position their brand. One of the largest and most famous fairs organised globally, are the following:

- » International Bulk Wine and Spirits Show, which is held in London, United Kingdom (pre-marked for bulk wine);
- » VinItaly, which is held in Verona, Italy (more than 150,000 visitors from around the world, 4,000 exhibitors, in an area of 90,000 square metres);
- » Prowein, which is held in Dusseldorf, Germany (more than 50,000 visitors from around the world, 6.000 exhibitors in an area of 67,000 square metres);
- » VinExpo, which is held in Bordeaux, France (more than 48,500 visitors from around the world, 2,350 exhibitors);
- » China International Wine and Spirits Exhibition, which is held in Guangzhou, China, (more than 50,000 visitors from around the world, 2.000 exhibitors in an area of 50,000 square metres);
- » The Wine and Spirit Wholesalers Association Convention, which is held in Orlando, USA;
- » Wine and Gourmet Japan, which is held in Tokyo, Japan.



These fair events are of international importance, and besides, we may mention wine fairs organised in Plovdiv and Belgrade. Fairs are events of a limited duration held to provide a place for the promotion and sale of goods or services. They are places where supply and demand meet, and we have met them since ancient times. The infrastructure built for the fairs is of foremost importance for the development of this activity, and the major fairs centres are located in developed countries in Europe, USA, and Asia. The main participants in the fairs are the fair organisations, exhibitors, and visitors. The fairs are an opportunity for wineries to present their offer to the wider global audience.

### 1.3. Wine museums

The museum is an institution that takes care of collections of artefacts and other objects of scientific, artistic, cultural, or historical significance and makes them available to the public in showcases or other settings that may be permanent or temporary. Larger museums are located in the most important cities in the countries and the world, and those of local importance are found in smaller cities and rural areas. There is a distinction of diverse types of museums, and the interest of this textbook are wine museums. Museums dedicated to wine are found in a few countries around the world such as France, Spain, Portugal, China, Italy, Bulgaria, Serbia, the Republic of North Macedonia, Greece, and others.

**Wine Museum in Pleven.** The Wine Museum was founded in 2008 in the city of Pleven as a public-private partnership. It is located in a cave at the protected location of Kailaka, near the artificial lake Totlebenev Val. The cave consists of five galleries with an area of 650 m<sup>2</sup>. The museum is equipped with two tasting rooms, a historic section, and a wine exhibition hall where more than 6,000 wines may be seen from all over Bulgaria, the oldest being more than 100 years old. In the museum's collection a variety may be seen related to viticulture and wine items, learn interesting things about wine technology and wine, and taste and buy bottles of wine from different varieties. The museum was founded in Pleven, due to the region's rich history of viticulture and wine production. Namely, the first high school for viticulture and winemaking was opened here in 1890, and in 1902 the National Wine Institute was established.

**Museum of Viticulture and Wine in Aleksandrovac.** MThe Aleksandrovac Museum of Viticulture and Wine is located in the winery of the Aleksandrovac Agricultural School, built in 1924 and uniquely representing this blessed wine region of Serbia and the famous vine and wine metropolis of Serbia - Zupa of Aleksandrovac. The Museum of Viticulture and Wine skilfully elaborates, collects, publishes, and organises various artefacts that showcase the long viticulture traditions of the Zupa wine region. It was opened in 2010 and has a permanent exhibition related to wine-making in this region.

The decision to organise such a wine museum in Aleksandrovac was supported by a variety of reasons, such as: the millennium tradition of winemaking, the location and significance of the Zupa region in the national wine production, the Zupa vineyards covering some 3,000 hectares making it the largest vineyard area in Serbia, a rich assortment of vineyards that come from excellent wines and wines of geographical origin, generations of Zupa locals who have been associated with vine growing and wine production for centuries, the existence of traditions of Zupa wines, which is known for most contemporary wine production, several dozens of small wineries producing and retaining wine in Aleksandrovac and the surrounding villages. The first vineyards here were established in 1891 (among the first in the Kingdom of Serbia), on a 40-hectare estate, and then a Vine-Gruit Growing Seminary School was established in 1921, which maintained the long tradition of vine growing and wine production in this region.



**Bordeaux Wine and Trade Museum.** The Bordeaux Historia Vini Association stands behind the initiative to open the Bordeaux Museum of Wine and Trade in 2008, located in the city of Bordeaux. Accommodated in three cellars, the museum is a collection of unique historical objects, many testimonies of the past and present. The museum has several panels and informational documents explaining Bordeaux's wine trade, from the evolution of the medieval wine traders from Bordeaux winery privilege, to the present day with the work of the wineries and the exports. The Museum covers several main topics:

- » Explaining Bordeaux's wine trading system: property viewing, brokering, trading thanks to numerous artefacts, models and 2D realisations;
- » The history of large 18th and 19th century trading families is narrated through family documents and testimonies, not forgetting the new traders developing in Bordeaux;
- » Different classifications: from the prestigious Napoleon III classification in 1855 to more recent regulations;
- » The Sulphur Revolution and the Maturing Processes Practiced in Chartron's Cellars;
- » Bordeaux port and wine exports are illustrated with various artefacts, documents, and other acts.

The museum also has a wine tasting, as well as a shop located in the old part of the building. The museum organises various temporary exhibitions (paintings, sculptures, etc.) in the main cellar of the museum.



**Santorini Wine Museum.** This museum is housed inside a natural cave eight meters underground, 300 meters long, in the form of a labyrinth. Located on the island of Santorini in Greece, the wine museum is owned by the Koutsoyannopoulos family, which took 21 years to finance and build the facility. The museum displays the history and love for the wine expressed by the inhabitants of Santorini in the period between 1660-1970. Visitors are provided with an audio guide to the museum, which is available in 14 languages. The rare exhibits, including wine production machines and tools, arranged in a way that present viticulture techniques in the past, are very attractive to visitors. At the end of the tour around the museum, visitors are invited to taste four wines produced by the Koutsoyannopoulos winery in the tasting room.

**California Wine Museum.** The museum opened in 2016 in Santa Rosa, California and features nine galleries covering an area of 4,000 square meters, featuring interactive and extraordinary exhibits related to the American wine industry. This museum is a collection, opened by Jim McCormick after 30 years of collecting artefacts related to wine production. Jim's idea was to preserve and present California's wine heritage, educate visitors on sustainable grape growing and combine food and wine. The museum offers the opportunity to taste wines through a selection of California wines through informal tasting and training sessions. The California Wine Museum also serves as a wine community centre, where forums, lectures, classes, seminars, and other events are held. The museum's collection, collected by the owner who is a long-time collector, antiques dealer and specialist in wine and viticulture artefacts, contains more than 1,000 historical artefacts. Much of the collection itself is catalogued and put up for sale.

**Wine Museum in Torjano.** Located in Torjano, Italy, this wine museum was founded on the idea and creation of Giorgio and Maria Lungarotti in 1974 and immediately received recognition for its originality and quality of its collections. With an exhibition of archaeological findings, artworks and ethnographic collections illustrating winemaking and viticulture, the museum offers a true journey through time and narrates a pleasant story, full of magical and unexpected interpretations that reveal thousands of aspects of wine: energetic and appreciated food stimulating properties, a valuable exchange product, an indispensable protagonist of the symposium, an element characterising religious rituals and a repetitive ingredient in pharmaceutical agents. The museum is for lovers of art, culture, and beautiful living, who want to discover the deep history of wine. Through its collections, backed by scientific research and museography structure, the museum contributes to discovering the culture hiding behind the wine consumption.

**Barolo Wine Museum.** The Wine Museum located in Barolo, Italy, opened in 2010 and considered the most innovative Italian wine museum, as well as one of the most important in the world. The building is located in a region known for its wines (Piedmont), housed in a castle with a history dating back more than 1,000 years. Created by the designer François Confino with the idea of being an interactive journey through culture and wine traditions, showing how wine influences civilisation and art. At the museum, visitors begin the first-floor tour that ends in the castle's semi-underground facilities. The museum also offers audio tours and wine tastings, as well as catamaran visits.

**Vivanco Museum of Wine Culture.** The Vivanco Museum of Wine Culture is located in La Rioja, Spain. It is housed in a 4,000-square-metres building with six rooms and one exterior, dedicated to valuing the relationship between man and wine with over 8,000 years of history. The aim of the museum is for visitors to get educated, learn, spread knowledge, and interact with wine as a civilised element. And all through art, sensitivity, respect, and innovation. This museum is considered one of the great icons of wine culture worldwide. In addition to permanent exhibit halls, the museum has a temporary exhibition hall, and outside, in the Garden of Bacchus, it has a collection of vines that may pride itself with more than 220 varieties from around the world.

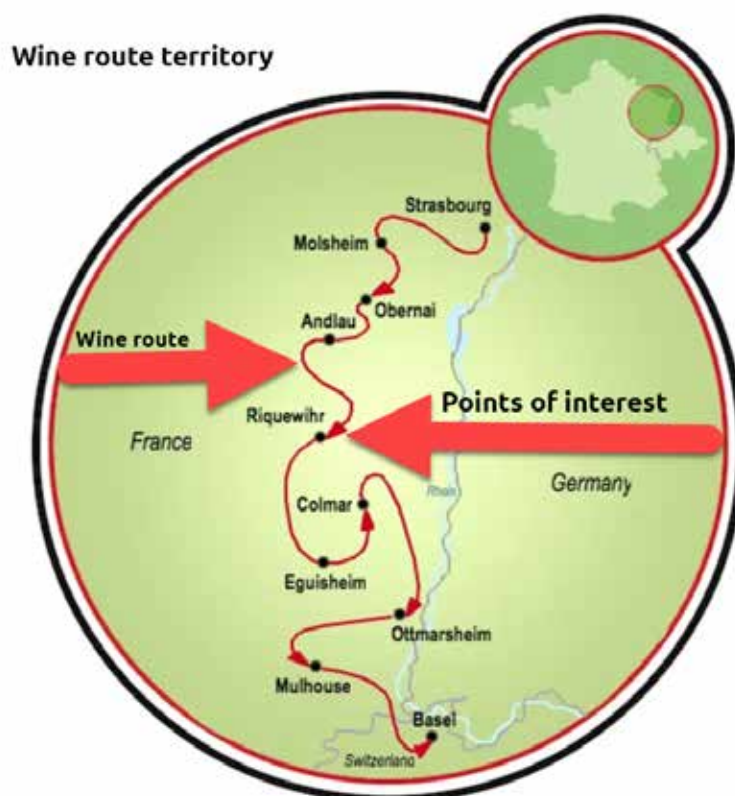
**Macao Wine Museum.** The Macao Wine Museum (peninsula in China) was opened in 1995. The 1,400-square-metres exhibition space is divided into three areas that focus on historical interest, a winery, and exhibitions, using maps, texts, and photographs to relive the history of this country's wine. Since it was Portuguese territory until 1999, Macao's culture is a mixture of Portuguese

and Chinese influences. The museum houses about 1,143 different wines, 1,115 Portuguese and 28 Chinese, with wine dating from 1815, the oldest exhibit in the exhibition. The museum reviews and presents the history and technology of wine production in Portugal and China. The museum's most important landmarks, besides the wine collection, are the exposed regional costumes from Portugal.

## 1.4. Wine routes

Wine ways or routes are one of the first aspects that arose from the need for wine tourism. Wine tourism and wine routes first emerged in the 1930s of the past century, when such routes were created in France and Germany to help local producers and the region popularise their wines by tourist visits. At that time, wine tourism was still not the case, as wine routes were not sufficient for tourism development.

**Image 1.** Scheme of wine route components through the example of Alsace (France)

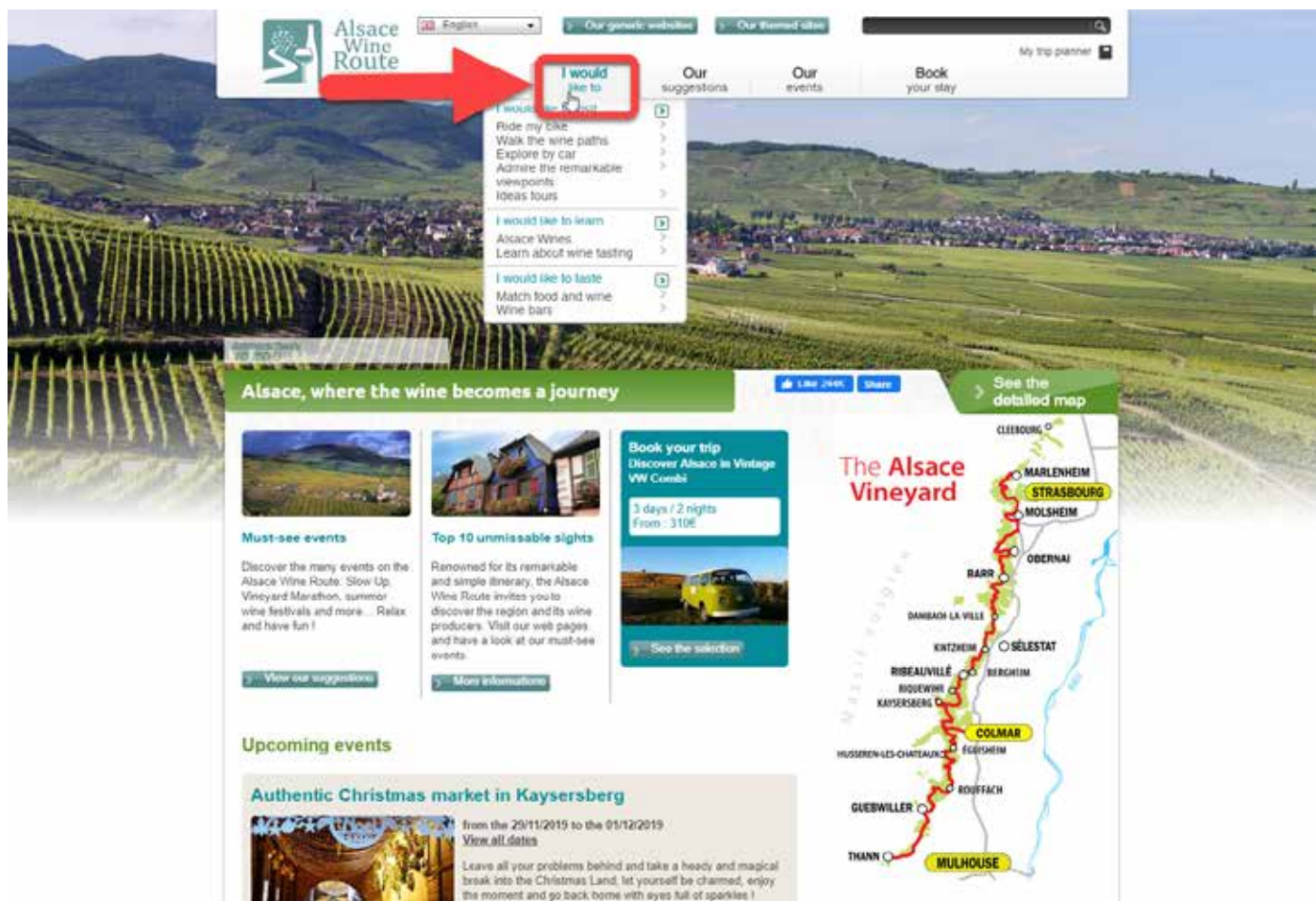


The wine routes in California and South Africa were formed much later as parts or as tourist arrangements, and wine tourism as a concept was recognised as a union of the wine business and the tourist offer. In Europe, although wine routes were created for visitors, a small number of them were open to wine tourists, that is, only a few organised tours and wine tastings of their products and would sell those on site. In the late 1990s, international wine and tourism conferences were organised by the wine industry and academia to draw attention to wine tourism. Wine and tourism have always been interrelated, but it is only in the last twenty years that there is a correlation in the function of the tourism industry, for which wine is an essential element of destination's attraction.

Wine routes are a type of tourist product that is intended for visitors and wine lovers and includes a specific route for tourists, wineries to visit on the road, as well as the region's natural and cultural heritage. Basically, the wine route covers a given line of movement of tourists in a particular territory. The wine route consists of the following components: the territory of the route or geographical scope, the route itself with its starting and ending points and points of interest represented in the route, that is, the facilities for visits, stays, etc.

Image 1 provides a scheme of wine route components of Alsace in France. This wine route has developed its own website, advertising all activities related to the route and made available to tourists, as presented in Image 2. It is a wide range of offers intended for tourists, such as accommodation, food, wineries, tastings, supplementary activities, events, museums, and alike. This wine route disposes of activities and instructions for the route visits, intended for diverse groups of visitors, such as bicycling tourists, adults, families with children, etc.

**Image 2.** The official website of the Alsace (France) wine route, with activities intended for the visitors



**Source:** <https://www.alsace-wine-route.com/>

States, besides the private sector, are also making promotional campaigns to create and promote such routes. In Italy, the 1999 legislation defines wine routes as itineraries created in geographical areas where quality wine is produced. In France, many of the wine routes are along the rivers and their use is combined with ship - river transport. In addition to the developed wine region of the old world, as well as the countries of the new world, wine roads are heavily advertised by countries such as Greece, Bulgaria, and Serbia.

The main idea of the wine routes is to attract tourists to the wine region by offering numerous supplementary activities in addition to the basic one, such as wine tasting and winery visits. To achieve this goal, there is a need to involve a larger number of stakeholders in route offerings, website development and offerings, maps, collaboration with accommodation and nutrition facilities, additional activities, natural and cultural heritage, development of mobile route application, and the like.

In addition to the national, there are also international wine routes and regions in Europe, and the Republic of North Macedonia is part of such a route through the European Inter Vitis Balkan Initiative, which includes various cultural paths.

## 2. Statistics related to winemaking

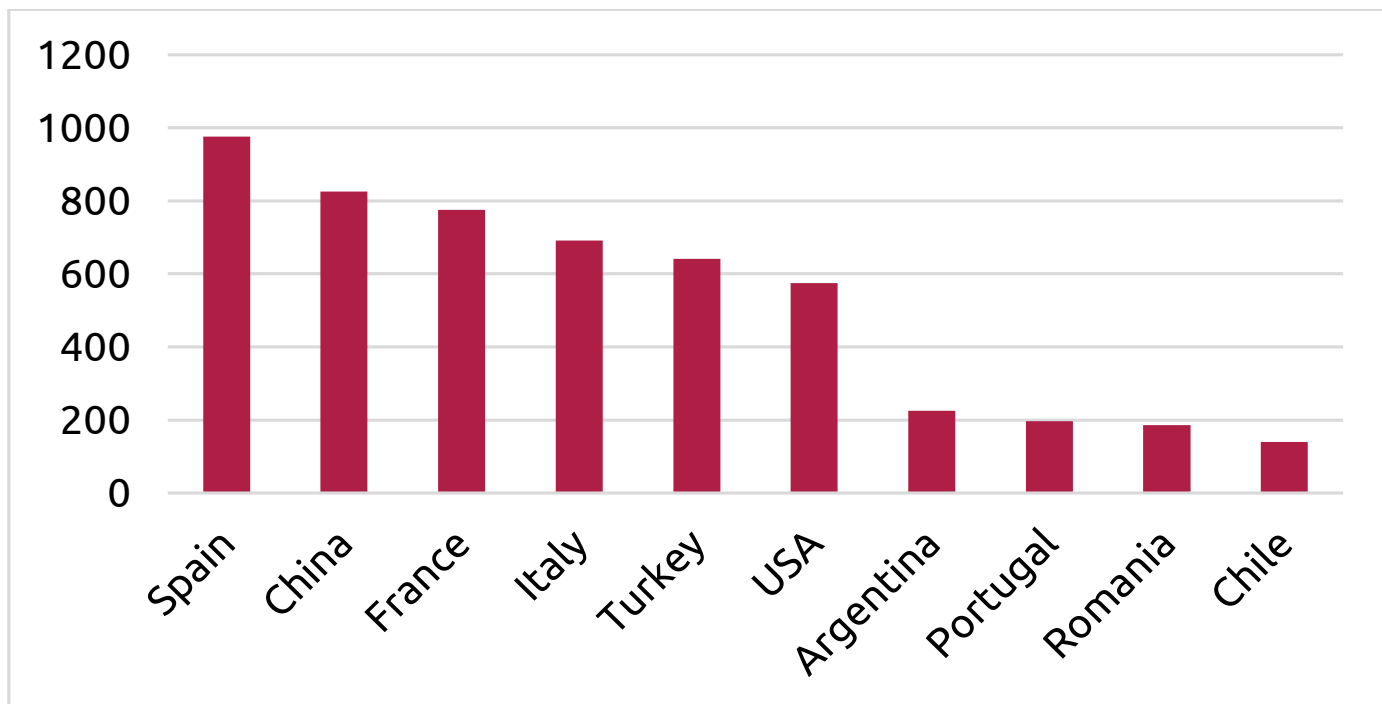
Key indicators relating to the global wine market starting from vine growing, wine production, as well as consumption in selected countries, which are of importance to winemaking, are provided in the table below. The statistical data on the global wine market referred to in Table 3 (28 countries), inform us that globally, the area under vines reaches 9,916,000 hectares (one hectare of land is the surface of square parcel with dimensions 100 on 100 metres, that is, 10,000 square metres).

**Table 3.** Key indicators for the global wine market in 2016 per selected country

Country	Surface under vine (000 ha)	Wine production (m.l.)	Wine consumption (m.l.)	Wine consumption (l./per capita)	Wine export (m.l.)	Wine import (m.l.)	% from global production	% from global consumption	% from global demand
France	776	4684	2736	41.3	1444	733	17.2	11.1	10.1
Italy	692	4905	2113	34.2	2083	235	18.0	8.6	5.2
Portugal	197	642	445	42.8	281	209	2.4	1.8	1
Spain	976	3883	700	15.1	2350	66	14.3	2.8	1.8
Austria	44	207	247	29	49	76	0.8	1	1.4
Germany	101	901	1894	23.1	374	1516	3.3	7.7	5
Greece	108	288	284	25.9	29	17	1.1	1.2	1.2
Switzerland	20	91	364	43.7	2	248	0.3	1.1	1.9
United Kingdom	2	4	1814	27.9	137	1946	0	5.5	7.9
Bulgaria	62	115	88	12.2	37	7	0.4	0.4	0.2
Croatia	26	87	188	44.3	4	27	0.3	0.8	0.4
Georgia	54	116	75	18.7	37	0	0.4	0.3	0.1
Hungary	70	279	221	22.4	64	26	1	0.9	0.4
Moldova	138	163	140	34.4	116	1	0.6	0.6	0.5
Romania	186	365	420	21.4	12	45	1.3	1.7	0.7
Russia	45	537	1058	7.4	5	526	2	4.3	2.2
Ukraine	88	79	231	5.1	56	34	0.3	0.9	0.2
Australia	133	1229	552	23.1	740	89	4.5	2.2	2.3
New Zealand	36	290	107	23.4	206	37	1.1	0.4	0.5
USA	575	3084	3390	10.6	569	1470	11.3	13.7	14.8
Argentina	225	1265	861	20	265	4	4.6	3.5	1.5
Brazil	82	261	361	1.7	2	85	1	1.5	1.4
Chile	140	1153	226	12.7	866	2	4.2	0.9	0.4
Algeria	66	52	58	1.5	0	9	0.2	0.2	0.6
South Africa	123	1107	428	7.9	424	3	4.1	1.7	0.7
Turkey	641	45	62	0.8	6	3	0.2	0.3	0.4
China	825	1025	1542	1.1	7	525	3.8	6.3	14.0
India	119	21	25	0	1	4	0.1	0.1	0.1
GLOBAL	9916	36130	32586	4.4	14141	14136	100	100	100

If we take a look at the chart 2 below, we may notice that the ten countries with largest surfaces under wine worldwide are Spain, China, France, Italy, Turkey, USA, Argentina, Portugal, Romania, and Chile. These 10 countries cover surface under vine of 5,233 (000 ha) of the total global surface, which reaches 9,916 (000 ha), or 52,7%.

**Chart 1.** Countries with largest surface under vine (000 ha) in 2016



**Chart 2.** Countries with largest wine production in millions of litres for 2016

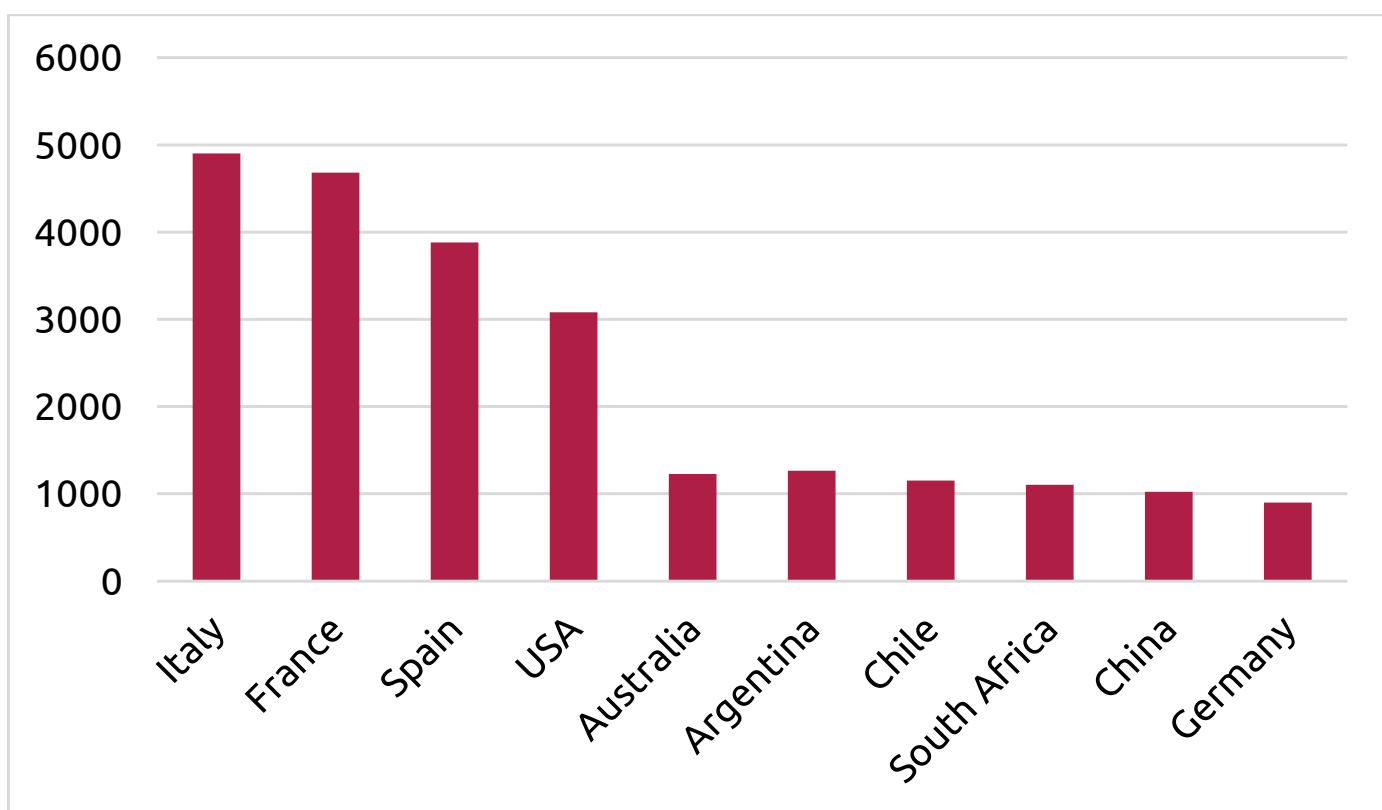


Chart 2 provides data on the leading ten countries worldwide as per wine consumption in million litres. The order of the largest wine consuming countries in global frames is the following: USA, France, Italy, Germany, United Kingdom, China, Russia, Spain, Argentina, and Australia. These ten countries in 2016 consumed 16,660 million litres of wine, and the total global consumption reaches 32,586, that is, they participate with 51,1%.

**Chart 3.** Countries with largest wine consumption in million litres for 2016

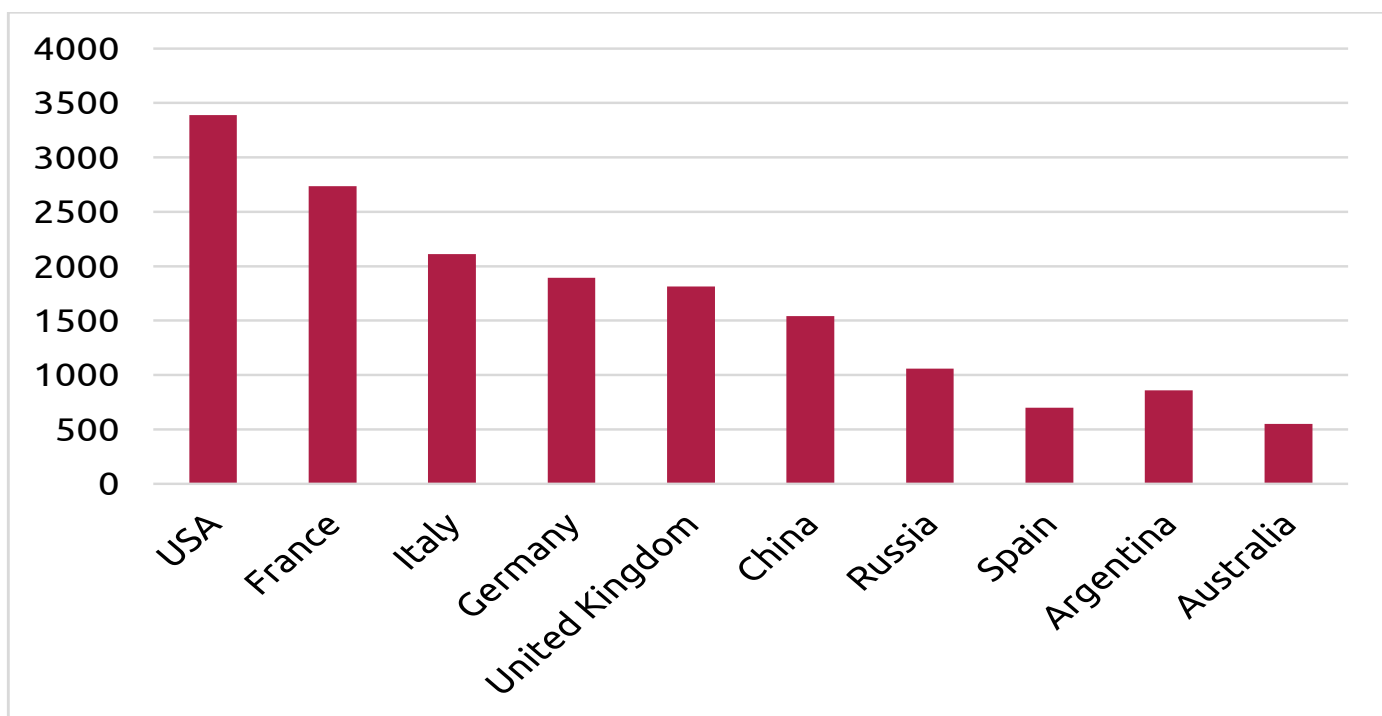


Chart 3 provides data on the leading ten countries worldwide as per wine consumption in litres per capita. The order of the largest wine consuming countries in litres per capita is as follows: Croatia (44,3 l), Switzerland (43,7 l), Portugal (42,8 l), France (41,3 l), Moldova (34,4 l), Italy (34,2 l), Austria (29 l), United Kingdom (27,9 l), Greece (25,9 l) and New Zealand (23,4 l). The average wine consumption per capita worldwide reaches 4,4 litres during the year.

**Chart 4.** Countries with largest wine consumption in litres per capita for 2016

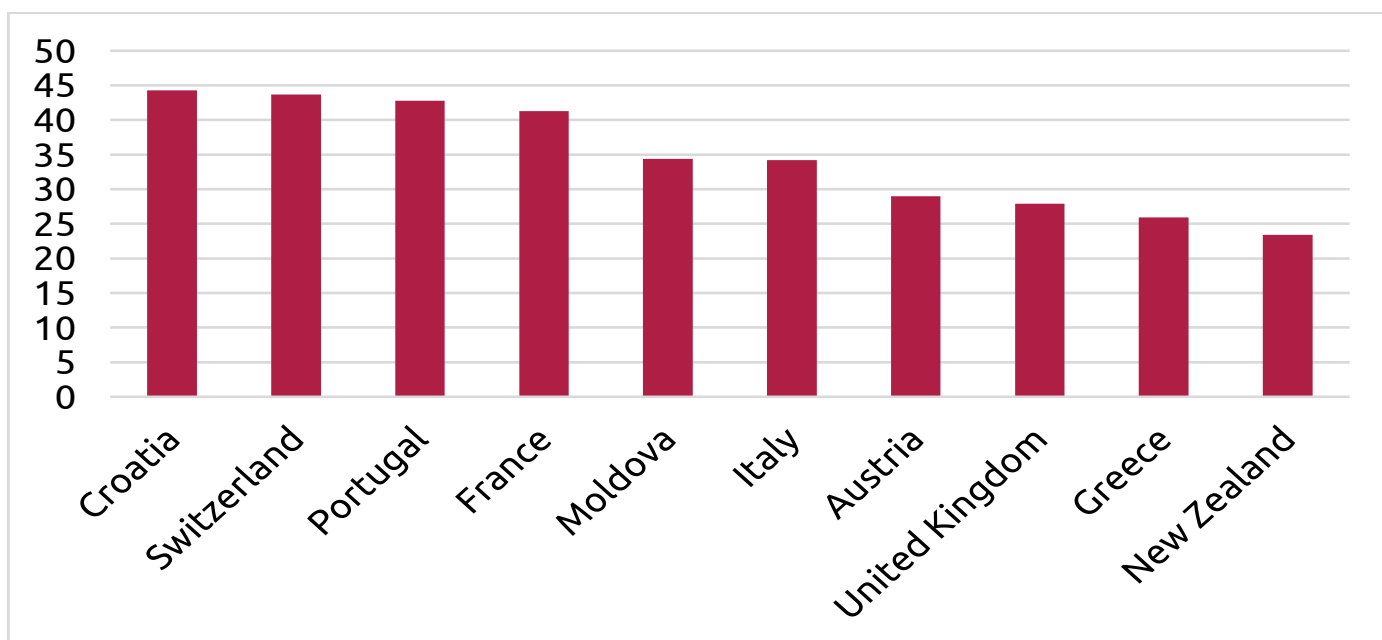


Chart 4 below provides data on leading ten countries worldwide per exports of wine in million litres. The order of largest countries per exports of wine in million litres is the following: Spain, Italy, France, Chile, Australia, USA, South Africa, Germany, Portugal, and Argentina. These ten countries in 2016 made exports of 9,396 million of litres of wine, and the total number of global exports reaches 14,141 million litres, that is, they participate with 66,4%.

**Chart 5.** Countries with largest wine exports in million litres for 2016

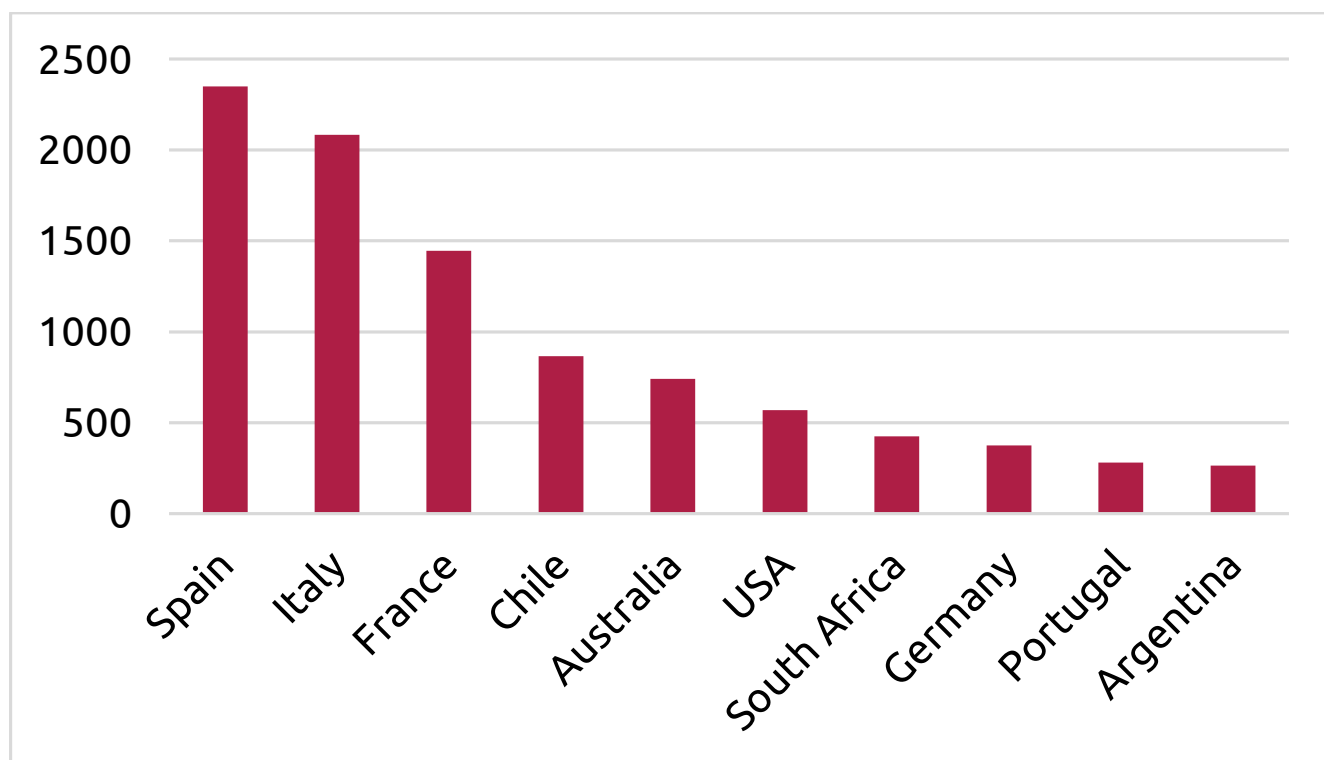


Chart 5 below presents data on the ten countries worldwide per imports of wine in million litres. The order of largest countries per wine imports in million litres worldwide is as follows: United Kingdom, Germany, USA, France, Russia, China, Switzerland, Italy, Portugal, and Australia. These ten countries in 2016 made imports of 7,497 million litres of wine and the total global wine imports reach 14,136 million litres, that is, they participate with 53%.

**Chart 6.** Countries with greatest wine imports in million litres for 2016

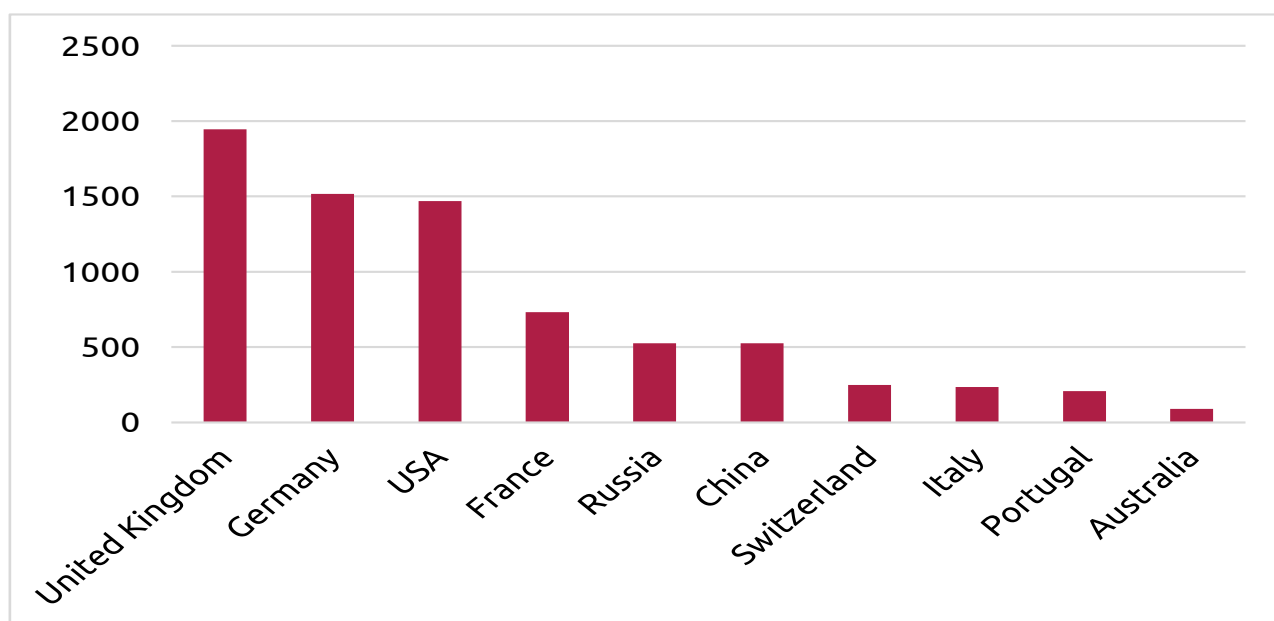


Chart 6 presents data on countries worldwide as per percentage of wine production. The order of countries as per percentage share in wine production globally is the following: Italy 18%, France 17,2%, Spain 14,3%, USA 11,3%, Argentina 4,6%, Australia 4,5%, Chile 4,2%, South Africa 4,1%, China 3,8% and Germany 3,3%. These ten countries in made percentage wine production of 85,3%, and the remaining countries participate with 14,7% in the global production.

**Chart 7.** Countries with largest percentage participation in the global wine production, 2016

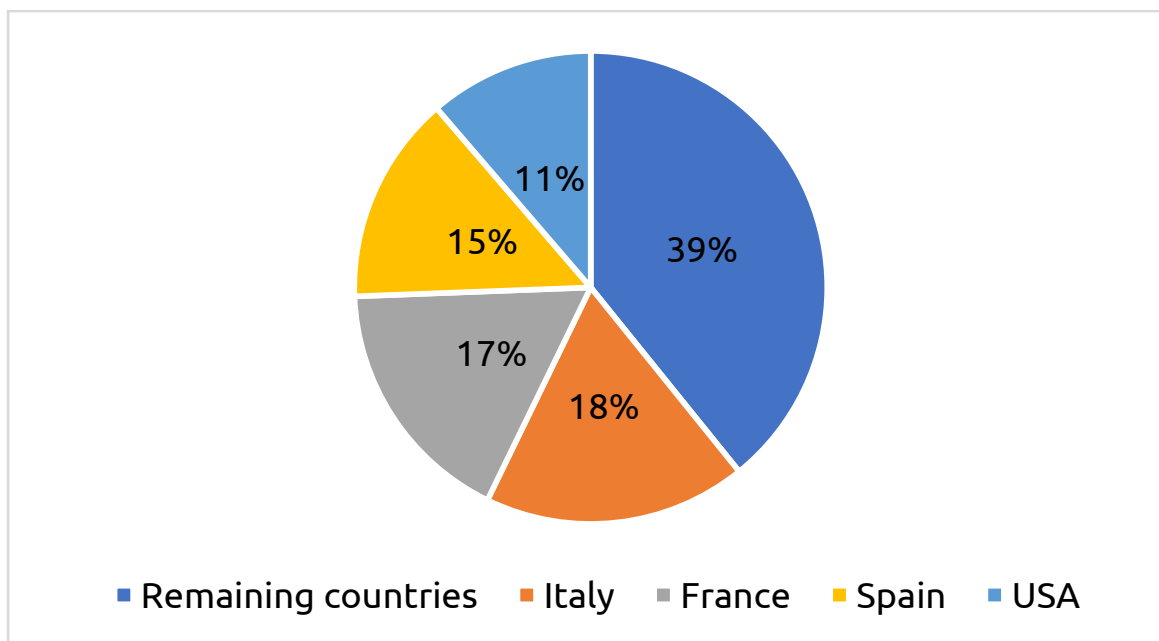


Chart 7 presents data on world countries as per the percentage of wine consumption. The order of the countries per percentage share in the wine consumption globally, is as follows: USA 13,7%, France 11,1%, Italy 8,6%, Germany 7,7%, China 6,3%, United Kingdom 5,5%, Russia 4,3%, Argentina 3,5 %, Spain 2,8% and Australia 2,2%. These ten countries in 2016 reached 65,7% of the global wine consumption, and the remaining countries participate with 34,3% in the consumption.

**Chart 8.** Countries with highest share in the global wine consumption in 2016

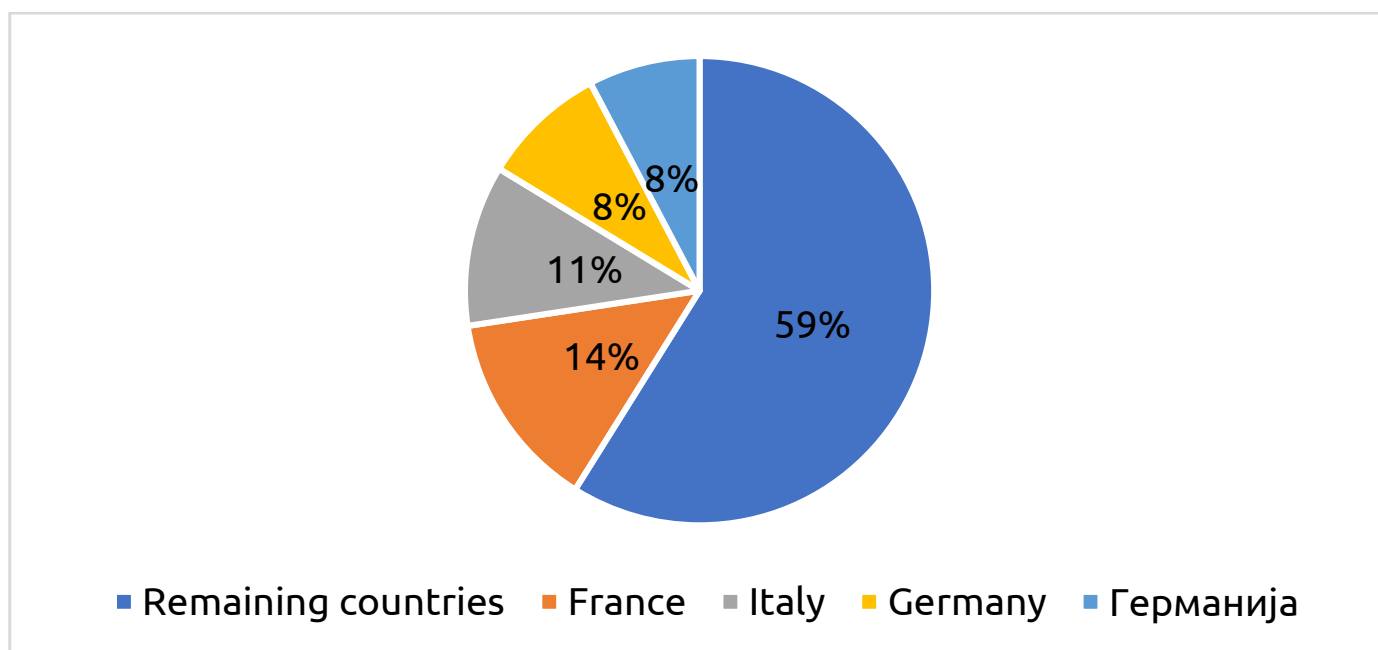
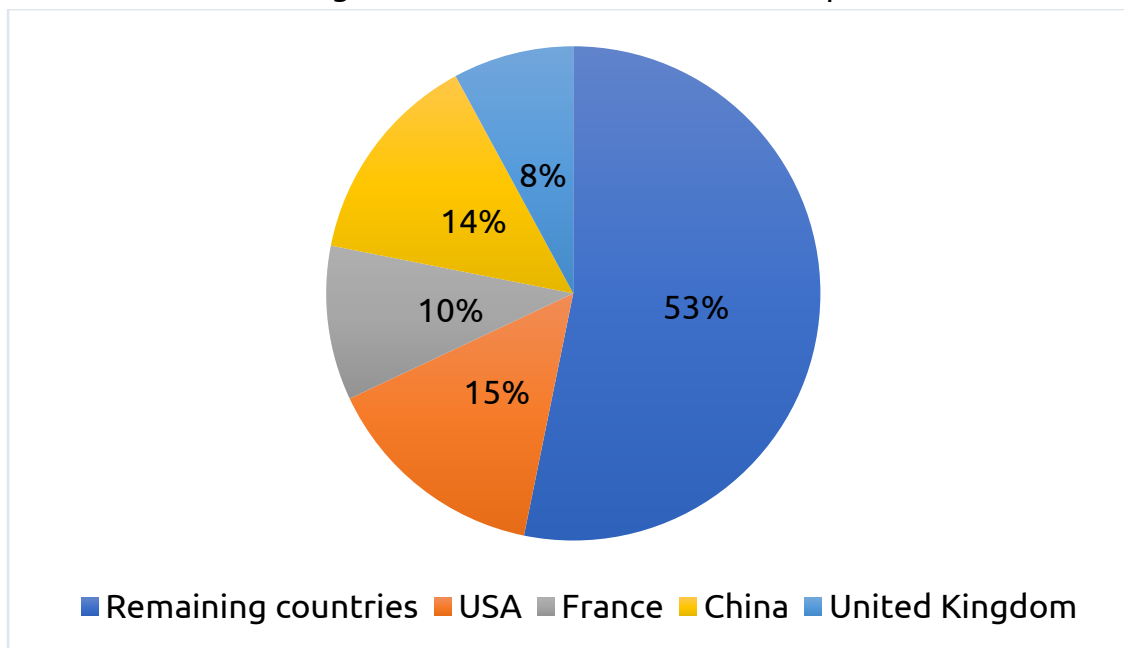


Chart 8 presents data on world countries by percentage of wine consumption. The ranking of countries by percentage share of wine consumption worldwide are as follows: USA 13.7%, France 11.1%, Italy 8.6%, Germany 7.7%, China 6.3%, UK 5.5%, Russia 4.3%, Argentina 3.5%, Spain 2.8%, and Australia 2.2%.



**Chart 9.** Countries with the highest share of world wine consumption in 2016



These ten countries in 2016 accounted for 67.2% of world wine consumption, while the remaining countries accounted for 32.8% of total wine consumption.

### 3. International experiences related to wine tourism and well-known wine regions worldwide

There are many regions and areas in the world where wine production is developed. In Europe, such areas exist in countries with developed wine industries such as France, Italy, Spain, Germany, and Portugal. These countries are also called “Old World” wine-producing countries, because of their rich wine-related history. The “New World” countries known for their wine production are the United States of America, South Africa, Australia, Argentina, and Chile. The textbook gives a brief overview of the wine regions and world regions, as well as the most important wine producing countries of the Old and New World.

It is in the interest of this study to present the most famous regions in the world, as wine tourism is successfully developed in these regions.

#### FRANCE

France ranks first in Europe and the world in quality wine production, followed by Italy. French wine production techniques, vine growing and the vine varieties themselves have been adopted in most wine regions around the world. Both French food and French wine are recognised as benchmarks for comparison worldwide. For many people in the world, France stands for wine, and their performances are associated with castles surrounded by rich grape vines, wet cellars, and large barrels full of the world’s best wines. There is a basis for such an image, as France cultivates vines and produces a wine with a rich history. In doing so, each winemaker adds something to the whole wine making process. The whole country is full of vineyards, with the exception of the northern regions such as Normandy and Bretagne, because they are quite cold to grow vines, but they still make beautiful apple cider from different apple varieties. This country has a different climate - from very cold in Champagne in the north to very warm in the southern parts of the Rhone Valley near the Mediterranean Sea. France’s climate diversity is explained by its large assortment of wines - from sparkling and white light wines to red and sweet wines. The wine producing regions in France are as follows: Alsace, Beaujolais, Bordeaux, Burgundy, Champagne, Loire Valley and Rhone Valley. . Other famous areas lie on the southern French coast and they are Languedoc, Roussillon, and Provence.



**Alsace.** The region is located in northeast France on the west bank of the upper stream of Rhine River and borders Germany and Switzerland. It has been producing wine since Roman times. The region has about 15,000 hectares of vineyards. The following grape varieties are grown: Riesling, Pinot Blanc, Gevortraminer, Tokai Pinot Gris, Silvaner. The annual production is 165 million bottles, 90% of which is white wine. Alsace is a classic French region that uses the name of the grape variety on its wine label. According to quality control, Alsace wines should be bottled in high tulip bottles. The label usually has the grape variety used and if the name of the vine is included, then 100% of the grapes should be of the vine itself. In French, *cuvée* stands for barrel, and from there the “*cuvée*” is the quantity of a barrel with certain barrel characteristics or *réserve* - meaning that the wine is of higher quality. In 1962, wines were included in the INAO Register of Geographical Origin. In 1975, the highest category for distinguishing high-quality wine vines, AOS, was introduced. The basic varieties of grapes grown here are Riesling, Gevortraminer, Pinot Gris, Pinot Blanc, Muscat. These varieties usually make dry wines, and there are some sweet varieties. Full and rich wines with mature, exotic, and fruity character are produced. The Alsace Gevortraminer is an ideal example of an exotic, spicy fruit wine with cashews. Pinot Blanc is the lightest wine in this group, and Pinot Gris and Muscat are somewhere in the middle.

Sweet versions of these wines are identified by one of the following two determinations: *Vendange Tardive* (last collection) and *Selection de Grains Nobles*. These two wines are very rich and sweet.

**Bouzole.** The region is located in the south of the Burgundy area, 400 km southeast of Paris. In this region the best variants of Bouzole wine are produced in 10 villages and on each label, the name of the village stands as the wine name. The vineyards in these villages are spread on mineral enriched soil, which provides a nice fruit flavour with special features.

**Bordeaux.** The most important and most famous wine-producing region in France is a coastal region 300 km southwest of Paris with a 120,000-hectare area. It is known for its red, white and dessert wines. Wine has been known there since Roman times, when France was a colony of the Roman Empire. During the 18th century, many English merchants opened offices in Bordeaux and began exporting wine to England. The region has 22,000 vineyard owners, and about 10,000 of them are castles (*châteaux*), and wine-producing estates. It produces one-third of all quality French wines. Of these, 85% are red, 3% rose and 12% white. The types of grapes grown here are Merlot, Cabernet Sauvignon, Cabernet Franc, Semyon, Sauvignon Blanc. About 850 million bottles of wine (red, white dry and white sweet wines) are bottled annually. Bordeaux is the largest wine name in France and produces wines of all kinds from dry red to rose, sweet and sparkling wine.

**Burgundy.** Some of the world-famous wines are produced in this region. Wine production began after the Romans conquered Burgundy. In the 6th century, all the vineyards were given to the church, but after the French Revolution everything was confiscated and divided into small pieces of land. This division has survived to this day. The vineyards, covering an area of 25,000 hectares, extend to several parts of the region. 180 million bottles of dry white and full red wines are bottled annually. The basic varieties of grapes are: Pinot Noir (red wine) and Chardonnay for white wine. Burgundy impresses wine lovers because it is great at producing the world's best versions of Pinot Noir and Chardonnay. These two varieties of wine are legally permitted if the location of Burgundy is indicated on the label. The cold climate in this region is the main reason for growing Pinot Noir and Chardonnay.

**Champagne.** For most people Champagne from France stands for luxury sparkling wine. The local producers try to use the word Champagne only for the wines from this region. The label may also contain a village name outside the area if the grapes are grown in this region. The vineyards cover an area of about 35,000 hectares and produce 250 million bottles annually. There are 300 wineries producing Champagne in the region.

**Loire River Valley.** The region is large and diverse, producing a large assortment of dry and sweet white wines, rose, red and sparkling wines from different types of grapes. The region is famous for white wines - the basic varieties are Sauvignon and Jenin Blanc, but not Chardonnay. The vineyards are spread along the banks of the Loire River which flows west into the Atlantic Ocean and has several smaller tributaries to the north and south. Closest to the ocean, to the west, Muscat is the primary wine produced, while to the east is the famous Sauvignon Blanc. In the central part of the valley there are two varieties of Jenin Blanc, used for the production of dry sweet white and sparkling wines, and Cabernet Franc is for the production of red and rose wines. This is perhaps the most beautiful vine growing and wine production region in the world. The plantations span 30,000 hectares, producing 400 million bottles of wine. The wines are embodiment of relief, soft, light, pleasant and magical.

**Rhone Valley.** The region is characterised by its greatest wine diversity and is one of the warmer wine regions in France. It is rather known for red wines, instead for white wines. The vineyards lie on a 70,000 hectares area, from which 450 million bottles of wine are produced annually, of which 75% are red wines.

**South Coast of France.** It covers an extensive area with the Pyrenees to the west and around the Italian border to the east, where large quantities of wine are produced. There are two major areas: Vin de Pays d'oc and Vin de Pays L'hérault, which export wines worldwide and produce non-expensive wines of a variety such as Chardonnay, Shiraz, Merlot, Cabernet Sauvignon.

**Languedoc-Roussillon.** There are many vineyards in this region. Most red wines are produced here, most of which are relatively cheap, table or folk wines. Vineyards occupy 160,000 hectares and annual output exceeds 2 billion bottles (1 billion = 1000 million).

**Provence.** This region is best known for its rose wines, which account for 50% of the country's total production. Lately, the popularity of red and white wines from the region has been increasing. The vineyards cover an area of 27,000 hectares and produce 140 million bottles annually, 75% of which are rose wines. The dominant varieties are Jeune Blanc, Shiraz, Grenache, Mourvèdre.

**Southwest region.** The vineyards cover an area of 16,000 hectares and produce 270 million bottles of wine. The grape varieties grown are Cabernet, Merlot, Semyon, Sauvignon, Jeune Blanc - for red wine. It is the region with the largest variety of varieties and one of the oldest in France. There are some varieties of wine found only here.



## ITALY

Italy ranks second in Europe in producing quality wine, right after France, and in some years before. Wine is part of Italy's old history. It was known to the Etruscans, then to the Romans, and the ancient Greeks called it Italy - Oenotria, meaning wine country. The whole of Italy is associated with wine. Each of the 20 areas deals with viticulture and winemaking, but with varying intensity. Today Italy is one of the leading countries in wine production and consumption. The total area of the vine is about one million hectares. Until 20 years ago, Italy produced about 75 million hectolitres of wine each year, which corresponds to 10 billion bottles, more than any other country in the world. At that time, every fifth bottle sold in the world was Italian.

Because of the large variety of types of wines produced from numerous and often little-known grape varieties, specialists recommend focusing on three basic regions that produce world-famous wines and are most commonly marketed - Piedmont, Tuscany, and Veneto.

**Piedmont.** Many quality red wines are produced here. Early ripening varieties that are resistant to the cold and humid autumn in Piedmont are prevalent in the region. Nebbiolo is the most famous variety, while Barbera is the most fertile. Wine varieties are grown on hilly terrain to provide optimum exposure to sunlight and heat. Barbera is a fruit variety in Piedmont with over 50% of the region's total grape production. Widespread throughout Italy - from Piedmont where the climate is moderate and creates favourable conditions for the production of the finest Barbera wines. Wine production is concentrated in the south of Piedmont. As a fairly cold region, Piedmont focused on producing wines with pure aroma and sharp acidity. Most of the wines are red, but there are also white wines. Of the white, the most important grape varieties are Cortese and Moscato. Piedmont is known for four red wines - Barbaresco, Barolo, Gattinara and Ghemme, all produced by the Nebbiolo variety. Another Piedmont wine is the light, sparkling Brachetto d'Acqui - sweet and red, with a strawberry flavour and aroma. Two more wines are being made - Barbera and Dolce. Most wines of these varieties are mid-level versions, with fresh fruit flavour and aroma.

**Tuscany.** The region lies west of the Apennines, extending west to the Mediterranean Sea. The cultural centre of the region is the city of Florence, the heart of the Italian Renaissance. For decades, Tuscany's wine production has been characterised by the Chianti area, but the contemporary picture is more complex. The most popular and appreciated variety here is the Sangiovese.



Depending on where it is produced, this variety may be the basis of very attractive but ordinary wines, as well as very fine, complex, and structured wines that require serious attention. There are five more Tuscany-based wines based on Sangiovese. Tuscany has been producing white wines for centuries, which are the pride of the region.

**Veneto.** The region is located in North-western Italy near Venice and is known for exporting three wines: white Soave wine and red Valpolicella and Bardolino wines. The basic grape variety is Garganega.

**Lombardy.** This region grows the famous red wines of the Nebbiolo variety, and the region also produces: sparkling white and rose, called Franciacorta.

**Umbria.** The region is located southeast of Tuscany.

**Friuli.** One of the smallest wine producing regions located in Northeast Italy. The terrain is high and steep, and the climate is moderate.

**Sicily.** The region is one of the oldest wine producing regions in the world. It emerged in the 8th century BCE, as a colony of Greece and established relations with countries across the Mediterranean Sea. After World War II, Sicily's wine production was modernised. In 1991 a Regional Institute of Viticulture and Winemaking was established to improve the wine industry in Sicily. Some Sicilian wines contain high alcohol percentages, due to the sunny and warm area and are high in sugar composition, and the white wines are darker in colour.

**Basilica.** Located inland, it is a small and little-known southern wine-producing region. The vineyards are cultivated on steep hills and warm climate - producing high-spirited red wines. On the territory of this region lies the extinct volcano Monte Vulture, on the basis of which the famous red grape Aglianico grows.

**Puglia.** It is located in the most southern part of the country. It was thought that quality wines could not be produced here because of the extremely hot and dry climate. The wines produced here (mostly red) are heavy, dark in colour, high spirit content and low acidity. They are primarily used for the production of vermouth. New technologies have been introduced lately, vineyards are being restructured, instead of old heavy and high spirit wines, lighter and fresh wines with good acidity are being produced.

**Sardinia.** The second largest island in the Mediterranean Sea, in recent years has been working on increasing wine development by introducing new methods to increase the quality of wine.

**Campaign.** Many people associate the concept of Southern Italy wines with Naples, but the vineyards are not in this city, but in the surrounding areas.

**Lazio.** It is located in Central Italy, to the north by Umbria and Tuscany, and to the south with Molise and Campania. About 90% of the wines in this region are white and the remaining 10% are red.



## SPAIN

Spain has a rich history of wine production. It is thought that viticulture was transferred here by the ancient Phoenicians 3000 years ago. The first vines were planted around 1100 BCE in the area of Cadiz, a city in Spain located in the Andalusian region. Today there are 12 million decars of vineyards planted and the country ranks third in Europe for producing high quality wine, following France and Italy. Spain has a range of varieties, most famous being Tempranillo, Garnacha, Albarrino, Muscatel and Pedro Jimenez. The wines are classified into several categories. Some labels on the bottle's label also indicate the minimum period of maturing the wine. The use of labelling terms on the label is not a guarantee, but it is usually a good sign of good quality. In the last decades, Spain's wine-growing regions have increased. The most famous wine in Spain is Sherry from the Jere region, but there are other regions that compete successfully. Spain is the leading country in the world in the field of organic production of vine and wine.



**La Rioja.** This region is located 160 km southwest of the Pyrenees. The mountain affects the region with a steep fertile valley to the west, and to the southeast after the Ebro River stream, the area is flatter. In the mountainous northwest known as Rioja Alta, the varieties Tempranillo and Garnacha are grown. Rioja is one of the most famous wine regions in the country mainly due to the production of red wines. They consist of three varieties of grapes. The basic one is Tempranillo, followed by the varieties Garnacha, Graciano and Mazuelo.

Producers who use a higher percentage of Tempranillo usually make their own wines in the so-called Claret style, lighter on tannins of red varieties of pale red wine. Claret is characterised as a wine between light red and dark rose wine. These wines are traditionally bottled in cylindrical bottles. Rioja's red wines, which have a higher percentage of Garnacha, are of a different Tinto style. These wines are of a softer structure and are typical of the Garnacha red plum aroma. The wines are also characterised by aromas of strawberries, raspberries, fruit flavour with good structure. Depending on the manufacturer, they mature from 5 to 15 years.

**Jerez.** This region is located in Andalusia, a dry and sunny area known for its bullfights and flamenco. Such a warm place is not expected to have any special wine, but the locals here produce one of the most famous drinks - Sherry. Sherry is basically dry white wine made from the Palomino variety, matured in wooden barrels with a little air to accelerate the acidification. From that basic wine, different styles of Sherry are derived. The name Sherry comes from the city of Jerez in the province of Cadiz in southern Spain. The town is located in the former city of the Mauritius, named Sherish. Archaeological excavations testify that wine was produced in this region back in the days of the Mauritians.

**Ribera Del Duero.** The surroundings of Madrid, as well as much of Central Spain are mountainous. 160 km north of Madrid is the Ribera del Duero with its vineyards spread around the Duero River. Spain's most expensive wines are produced here, of Tempranillo variety. For many years, the region has been dominated by one producer, the legendary Vega Sicily cellar. In fact, the most famous wine from all of Spain is Vega Sicily Unico - a red wine made from Tempranillo and red varieties from Bordeaux that made this region famous at the end of the 18th century. The wines are dark in colour and a bouquet of vanilla aromas, red fruits, skin, and spices. They mature from 7 to 25 years.

**Priorat.** A small Spanish province (part of Catalonia). The southern and south-eastern parts are very well heated by the sun, which helps the grapes ripen. The best wines here are produced from the red grape variety Garnacha, brought from France, where it is known as Grenache. The wines produced are powerful and full and mature in a period of up to 12 years.

**Toro.** Mostly red wines are produced from the local variety Tinta del Toro. The resulting wines come with aromas of red fruits, vanilla, and leather. The taste is mostly fruity, with a high acidity and full body. They mature in a period of up to 20 years.

**Penedes.** The region lies southwest of Barcelona and is the birthplace of Cava - sparkling wine made using the French champagne method. Penedes is a relatively large region comprising three subregions. The coldest is on Catalan Mountain, where many of the varieties of sparkling Cava are grown. Downstream of the coastal lowlands, the temperature rises, allowing Temprano and Garnacha to grow. Non-traditional varieties are also grown in Pendas, especially the French Cabernet Sauvignon, Merlot, Pinot Noir, Sauvignon Blanc, and Chardonnay. Labelling Cava indicates that it is a sparkling wine produced by the champagne method from specific grape varieties - traditional.

**Rias Baixas.** In the northwest of Spain lies the province of Galicia, a region known for the sacred Santiago de Compostela with a cold, even cold climate. The rapid development of the wine industry in this region produces fresh and pleasant white wines, mainly from the Albarino variety. As in other cold areas, wines with fresh and clean characteristics of apricot and peach flavour and balance can be produced here, with balanced but sharp acidity. Labelled as Albarino wine, it should be entirely of this variety.

**Rueda.** To the west of the Ribera del Duero to the north of the mountain lies the Rueda wine region - with mild climate, warm summers, and cold winters. This region gains in popularity with its white wines, fresh, with a ripen yellow fruit aroma. The basic grape varieties for white wines in Rueda are Verdejo, Viura and to a lesser extent Sauvignon Blanc.





## PORTUGAL

Portugal is best known for its Porto wine production. It is popular all over the world. The disadvantages are that other Portuguese wines remain in the shade. In recent years, the state has been making efforts to popularise local wines, instead of only the highly treasured Porto. Portugal is one of the leading wine producing countries in the world. The Portuguese wine classification system is known as the Denominacao de Origem Controllada (DOC), as well as other systems in Europe aiming to regulate the geographical origin and variety of grapes used. According to European law, when the name of the variety is used on the label, it means that at least 80% of that grape should be used for wine production. The first regions in Portugal with status (DOC) are Dao, Douro, and Vinho Verde. The use of the word *reservée* on the Portuguese wine label indicates that the wine was matured under special conditions.



**Dao.** The terraced vineyards that form the landscape of this area are located high in the mountainous regions. In the plainer western areas, the vineyards are characterised by a warm climate, which helps the grapes to mature quickly. The red wines are represented by the Turriga national variety and come with a ripe fruit style, floral notes, and a perfumed aroma. The best representatives of white wines are the aromas of nuts, which is a characteristic of the Encruzado variety. Characteristic of the wines of this region is their softness.

**Douro.** This region is famous for producing red wines with ripe fruit flavour, a light texture, mostly from the varieties Turringa National and Tinta Rorris. These varieties can be found on the wine labels. The most famous red wine from Douro is Barca Vela. The Douro region is famous for its Porto wines that are sweet, and brandy reinforced. There are different types of Porto, but they all have general characteristics - for the most part Porto is red, always sweet, and always has a higher spirit content than other wines, often around 20%. Most countries around the world use Porto wine differently. The French consume it as an aperitif before eating, while most English-speaking countries consume it after dessert as a dessert drink.

**Vinho Verde.** Unlike Porto rich and full wines, this region offers light and fresh wines that reflect their image. Wines from Vinho Verde are also called green wines, which means that the green is obtained by a specific method of growing vines. This region produces red, rose, and white wines, but only white wines are exported. The typical wine of this region is high acidity, fresh, sharp, with green fruit characteristics. The best varieties are Loureiro and Alvarinho. If the wine is produced by 100% of one of the two varieties, the name shall be indicated on the label.

Madeira Island, located in the Atlantic Ocean, a Portuguese archipelago, produces traditional Madeira wine dating back to the 16th century, when the island supplied the ships with wine for their long voyages.

## GERMANY

A system of geographical origin of quality wines has been introduced in Germany with 13 wine regions divided: Ahr, Baden, Franken, Hessische, Bergstrasse, Mittelrhein, Mosel-Saar-Ruwer, Nahe, Pfalz, Rheingau, Rheinhessen, Saale Unstrut, Sachsen, Württemberg. It is believed that viticulture appeared during the Roman Empire, also embracing Germany as one of its parts. Over the centuries, winemaking has developed around the monasteries and most of the vineyards have been owned by the church. In the 17th century, Napoleon confiscated the church's vineyards and sold them to small vineyard owners. That is one of the reasons that there are more than 100,000 small vineyard owners in Germany today. There are about 1 million hectares of vineyards in the country with 90% of them white varieties, mostly Riesling and Muller Thurgau. The most common of the red grape varieties is Spatburgunder - the German name for Pinot Noir. Between May and November, wine festivals are held in many places along the wine route in Germany. Most along the Rhine, Main and Mosel rivers, also in the Pfalz and Baden regions. At separate stands, wine producers offer the best of their cellars, and visitors can try local cuisine specialties. Wine queens are also chosen in many places. Famous regions producing quality and world-famous wines in Germany are listed below.

**Mosel-Saar-Ruwer.** The region stretches along the Mosel River, which continues north and connects to the Rhine. Saar and Ruwer are two small rivers that flow into Mosel River. It is an extremely picturesque landscape with hills that are littered with vineyards. This is the territory of the Riesling, where most of the wines produced are considered classics, with a noticeable sweet note with high acidity. Mosel wines are characterised by their delicate nature and the fine balance between the fruit sweetness and acidity. Primarily, Riesling wines are produced, with floral flavour characteristics and a low degree of spirit, with light carbonation.

**Rheinhessen.** This wine region is the largest of all regions in Germany. Here they produce ordinary, attractive, lightly sweet fruit wines of the Muller Thurgau variety.

**Rheingau.** Rheingau is the smallest wine region in the country, located on the north bank of Rhine River. Wine is produced in the southern parts of the region. The best wines produced here are of Riesling variety, they are characterised with floral flavour. Of the red varieties, good wines are produced of Spatburgunder, with flavour of blueberries, blackberries, light to medium body and soft tannins.



**Pfalz.** This region is located south of Rheinhessen to the border with France and the French Alsace region. Here the producers make very high-quality white wines. The region has many sunny days during the grape growing season, reflecting the full and mature taste and aroma of the wines. The best wines here are produced from Riesling, as well as from Silvaner and Muller Thurgau varieties.

**Nahe.** The wines of Riesling, Silvaner and Muller Thurgau varieties deserve attention in this region. It is advisable to consume these wines in a period of up to three years.

## UNITED STATES OF AMERICA

On the territory of the United States of America there are many wine regions, or wine countries, of which the most famous are situated in California, New York, Oregon, and Washington. Traditionally, vine growing and wine production in USA was developed along the rivers or lakes, a tradition which has survived up to today.

**California wine region.** US wine production is most prevalent in California, which has seen intense growth over the last two decades. The early 1970s for the California wine region are of the utmost importance for its development. Only in the two most prominent areas of this wine region, Napa and Sonoma, there are over 820 wineries with annual turnover of many billions of dollars. The vineyards in California are spread over an area of 471,000 hectares, distributed between 2,000 cellars, visited by millions of tourists. California produces 90% of the US wine. Vineyard cultivation and wine production are widespread throughout the length and breadth of California. The most famous areas of Napa and Sonoma are north of San Francisco, with varieties of French, Italian and Spanish origin grapes grown.

**Mendocino County.** Lies on the coast north of Sonoma. In the warm areas, varieties such as Shiraz and Granage are grown, and in the cold regions - Pinot Noir and Chardonnay, as well as the production of sparkling wines from these varieties.

**Monterey County.** Is a coastal area, spread south of San Francisco. What is produced here is Chardonnay, Riesling, and Gewurztraminer.

**Napa Valley.** This famous wine region is located in the Napa area, north of San Pablo Bay. The term Napa Valley is widely used on the wine labels produced here, but there are more suburbs in the region itself such as Carneros, Stags Leap County, Oakville and Redford, Vedder Mountain and Howell Mountain.

**San Luis Obispo County.** Located between Los Angeles and San Francisco and features two areas. Edna Valley, which produces very good Chardonnay and Paso Roble, which has Chardonnay, Pino Noir, Shiraz and Granage.

**Santa Barbara County.** Located south of San Luis Obispo and has two main areas, the Santa Maria Valley, and the Santa Ines Valley. Both areas are cold to the ocean and warmer to the interior. It produces Chardonnay and Pinot Noir.

**Sonoma County.** It is divided into more wine areas such as Alexander Valley, Sonoma Coast, Russian River Valley and Dry Creek Valley. Most commonly grown here are Cabernet, Chardonnay, Pinot Noir, Zinfandel and Shiraz.

**New York wine region.** New York State has a long history in grape growing and wine production. Due to the cold climate, in some parts of the country many wine producers grow hybrid varieties of grapes. The main vine growing areas are the Hudson River Valley, the Finger Lakes, and the North Fork of Long Island.

**The Hudson River Valley.** Is an area dominated by moderate climate. The highlands on either side of the Hudson River are favourable for vineyards. It produces Pinot Noir, Chardonnay and Cabernet Franc.

The wine area **The Finger Lakes** is extremely picturesque with green hills scattered among the lakes. Because the climate is colder, Chardonnay and Riesling are grown here. In some parts, the vineyards come in contact with more sunlight and they produce Cabernet Franc and Merlot here. The area is also known for the hybrids of Seyval, Vidal and Vignoles - all white wines.



**North Fork.** Is a warmer climate wine area, which is a prerequisite for growing and producing Cabernet Sauvignon and Merlot, as well as Chardonnay and Cabernet Franc.

**Oregon wine region.** The vineyards in the state of Oregon are widespread in the coastal region, which is characterised by a cold climate, especially in the northern part of the state. The region is attractive for growing Pinot Noir and Chardonnay. There are several areas in the region, such as the Willamette Valley, the Umpqua Valley, as well as the Rogue and Applegate Valley.

**The Washington wine region.** Is the fastest growing wine region. Most of the vineyards are in the semi-arid part of the country, where the climate is characterised by warm days and cold nights. Mostly produced here are Cabernet Sauvignon, Merlot, Shiraz and Riesling. There are three important wine areas in this region: the Columbia Valley, the Yakima Valley, and the Walla Walla Valley.

## ARGENTINA

Immigrants from Chile in the 16th century make the start of viticulture and wine production in Argentina. Later, in the 19th century, European expatriates from France, Italy and Spain expanded the diversity of varieties by introducing European varieties. Rail construction helps to spread vineyards by providing cheap transport. Until the early 1970s, basic production was cheap wine for domestic use. Gradually they moved towards reducing quantity at the expense of quality through control.

Argentina is among the largest wine producers in the world. The wines produced are of many varieties, but on the world stage they are known for Malbec and Cabernet Sauvignon, and the white varieties for Chardonnay and Torrontes. In recent years, the grapes produced are of exceptionally good quality. The interest in wine as an export-oriented product is high. All kinds of wine are exported. There is hardly any wine import to Argentina. Although Argentina is currently a major wine exporter, the early 1990s were the beginning of its development. The main wine regions from the north to the south are La Rioja, San Juan, Mendoza, and Rio Negro.

**Mendoza.** This wine region is the largest hot climate region for wine production, accounting for about half of all wine production and three-quarters of South America's wine production. It is the largest area that covers 80% of all vineyards. The best of the red wines are Cabernet Sauvignon and Shiraz and the lesser known grape variety called Malbec. As a special wine product, Argentinian Malbec is demanded everywhere. The production of Pino Gris is also very successful. The best wines in the region are produced from Malbec, Cabernet Sauvignon and Chardonnay. The main sub-regions are Luyan De Cujo, Maipi and Valle De Uco.

**San Juan.** This region is the second wine-producing region in Argentina known for Shiraz production.

**La Rioja.** Is a region in Argentina known for its plantations of the Torrontes variety.



## CHILE

In Chile, viticulture has been developing since 1548, when Father Francisco de Carbantes brought them from Peru and planted the first vine of the Pais variety. Don Silvestre Ochagavia is recognised as the father of viticulture and wine production, who hired a specialist from France and planted the first French vineyards in the Maipo Valley in 1851. Chile is one of the first countries to begin the modernisation of viticulture and wine production in the 1980s. During the 1990s, Chile's wine production is already well-known worldwide, which greatly increases domestic wine consumption. Chile is one of the countries with the largest wine exports in the world, with 54% of total exports going to European Union countries, followed by the United States and Canada.

Chile's wine-producing regions are located in the central part of the country. The warm climate is excellent for growing red grape varieties such as Cabernet Sauvignon, Merlot and Carmenere, which is a local Merlot-like grape variety. They are ordinary but attractive wines. Large quantities of Chardonnay and Sauvignon Blanc are also exported. The main wine regions of Chile are Maipo Valley, Rapel Valley, Aconcagua Valley, Colchagua Valley and Casablanca Valley.

**Maipo** region is located near the capital Santiago and is a leading region in quality wine production. The best wines are produced by Cabernet Sauvignon and Merlot and some of them are highly valued worldwide.



**Rapel** is the largest region producing mostly red wines, of which the wines produced from the Carmenere variety deserve special attention.

**Colchagua** is known as a wine region for the production of Cabernet Sauvignon and Merlot, which have great potential for maturing.

**Aconcagua** is a region where red wines are produced, mostly Cabernet Sauvignon.

**Casablanca** is a region with a cold climate, which is an opportunity for production of white wines from the Sauvignon Blanc and Chardonnay varieties. The first ones are fruity and fresh, and the latter often mature in oak barrels.

## AUSTRALIA

Australian wine production began its development in the mid-1980s. In Australia there are three main wine producing regions located in the south-east of the country: South Australia, New South Wales, and Victoria. These three regions form a mega region called Southeast Australia; a term often found on the labels of Australian wine bottles. If wine is produced in any of these regions, the name is used to denote the region. Zones, regions, and sub-regions are also used in addition to the name of the region. In Australia, the state has taken a serious approach to wine production and has been included in the country's strategic and development policies. The country, one of the world's wine producers and exporters, has developed a Strategic Plan for the Development of the Wine Industry.

The most important grape growing areas in the **South Australia region** are Barossa Valley, Coonawarra, Longhorne Greek, McLaren Valley, Clare Valley, Piccadilly Valley. Most wines are produced in this region and various vines are grown.

**New South Wales** is a wine region in which the warm climate allows cultivation of varieties such as Cabernet Sauvignon and Shiraz. This region specialises in the production of Semyon. This variety is known worldwide and highly rated by wine specialists. Hunter Valley is Australia's oldest wine region, and the first vineyards were planted here in 1825. White wines are mostly produced, with Shiraz as prevailing variety. In addition to these subregions, it is worth mentioning the Maggie area, where Chardonnay, Cabernet Sauvignon and Shiraz are grown.

**Victoria** is Australia's main southern wine region, covering cold areas of the South Coast and warm areas inland to the north. The region produces the famous Muscat liqueur, which is sweet, with a 20% alcohol content and a taste of figs and plums. Yara Valley is the oldest wine region in this region known for its cold climate. The area is known for producing Pinot Noir and Chardonnay. Heathcote is an area that until the 1960s was known for its sheep breeding and mining industries, and today for the best Shiraz producers.



## SOUTH AFRICA

Wine production is an important part of South Africa's economy, and this country is among the largest wine producers in the world with over one million hectares of vineyards, close to 3,000 varieties of grapes, 10 million hectolitres of wine a year and about 300,000 people engaged in this industry. The country has a centuries-old tradition of wine production, and wines are sold worldwide because of the decent prices and excellent quality.

South African wines are recipients of many prestigious awards from international wine exhibitions around the world. Well-known white varieties of vineyards are Chenin Blanc, Chardonnay, Sauvignon Blanc, Colombard and Muscat. Of the reds, the most popular are Pinotage (cross between Pinot Noir and Hermitage), Cabernet Sauvignon, Merlot, Shiraz, Senso, Cabernet Franc, Petit Verdot. Grape growing regions are scattered in the southernmost coastal zone of the country, mainly in the province of Cape. Since 1973 a system of geographical origin of wines has been introduced in the country, according to which South Africa is divided into four regions, 21 areas, 61 smaller districts and many independent wineries.

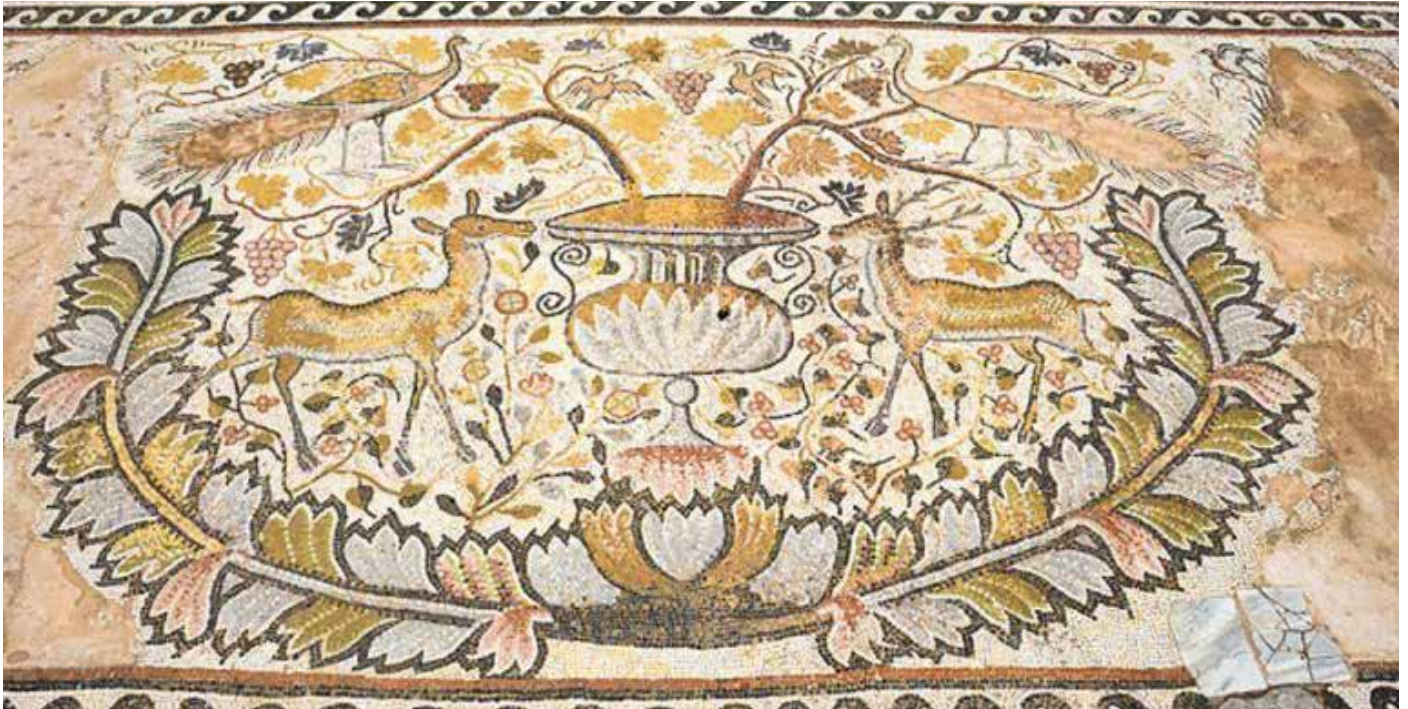
Well-known wine regions are: Constantia, Stellenbosch, Paarl, Franschhoek Breede River, Overberg, Worcester, Durbanville, Swartland and Cederberg. The largest and most certainly one of the most famous cellars is Nederburg.





## II. POTENTIALS OF WINE TOURISM IN THE REPUBLIC OF NORTH MACEDONIA

The rich tradition of vine growing and wine production in the Republic of North Macedonia started back in ancient times, testified by the numerous artefacts found in this area. Golden amphorae and craters (vessels for wine transportation and consumption) were found at the necropolis site in Trebeniste near Ohrid. The bronze statue Menada, found in Tetovo, dates from the 6th century BCE. The menades were companions of the wine god Dionysus and during the celebrations in his honour, they would serve the guests.



The tradition of antiquity continued in the Roman period, when Macedonia was one of the most important wine regions, and that tradition continued until the Slavs arrived, and continued until the fourteenth century. During the Ottoman Empire (1350-1918), wine production in Macedonia declined and was maintained in numerous Orthodox monasteries. Phylloxera (a small insect that attacks the root and leaf of the vine) strongly affected Macedonia between 1890 and 1920, when many vineyards were excavated, and in some areas wine production and grape growing were fully terminated.

The oldest agricultural schools in the country were established in Bitola in 1908, in Tetovo in 1928, but only after World War II did departments for studying wine production and viticulture emerge. The Institute of Agriculture in Skopje was established in 1927, and the departments of viticulture and wine production were established in 1944.

Macedonian viticulture peaked in the 1980s, when Macedonia produced two-thirds of the total wine production in the former Yugoslavia, but with gaining independence in 1991, wine exports declined dramatically.

Today, viticulture is one of the main branches of the total agricultural production, that is to say, the most important strategic industry in the Republic of North Macedonia, taking into account that together with wine production it contributes about 17% -20% of the agricultural GDP (gross domestic product). Wine ranks first in the export of beverages, and is the second most important product, after tobacco, in terms of export value of agricultural products. The vineyards today cover about 24,000 hectares. However, despite favourable climate conditions, large fluctuations have been observed in the last 30 years on the grape growing areas. This situation is a consequence of the delay in the restoration of the vineyards, that is, the deteriorated age structure of the vineyards, where the share of the plants over 20 years old is very high. At the same time, the size of

the plots is small, due to the long fragmentation of agricultural land, due to inherited traditions, lack of land market and long periods of underinvestment in this sector.

In 2018, the total wine production in the country was 781,292 hectolitres of wine and this is a slight decrease in production compared to other years. The average annual wine production is about 800,000 hectolitres, most of it as bulk wine (about 80%) and the rest as bottled wine.

In the Republic of North Macedonia today there are over 60 wine cellars located in the main wine-growing regions. Most of these wineries are mainly small and medium-sized, with capacity of up to 100,000 hectolitres, and only a small number have a capacity that is greater than 100,000 hectolitres.

These wineries strive to concentrate on bottled wine production and high-quality wines through strict control of variety selection, vineyard management and harvesting, transportation and delivery practices. In addition, they invest in sophisticated finishing and refining equipment, bottling, and marketing technologies and are competitive in both, domestic and foreign markets. Some of these wineries are focused on wine tourism development and have built a material and technical base for tourist acceptance and service, wine tasting, vineyard viewing, familiarising with the wine production process, wine sales, and additional services, such as conference facilities, sightseeing and organised tours and activities in the region and the like.



## 1. Wine regions

There are three grape-wine regions in the Republic of Macedonia: Central Wine Region – Povardarie, Western Wine Region (Pelagonija-Polog) and Eastern Wine Region (Pcinja-Osogovo). These regions are divided into 16 winelands.

**Image 3.** Wine regions in the Republic of North Macedonia



**The Eastern** wine region comprises the following winelands:

- » Kumanovo winelands
- » Kratovo winelands
- » Pijanec winelands

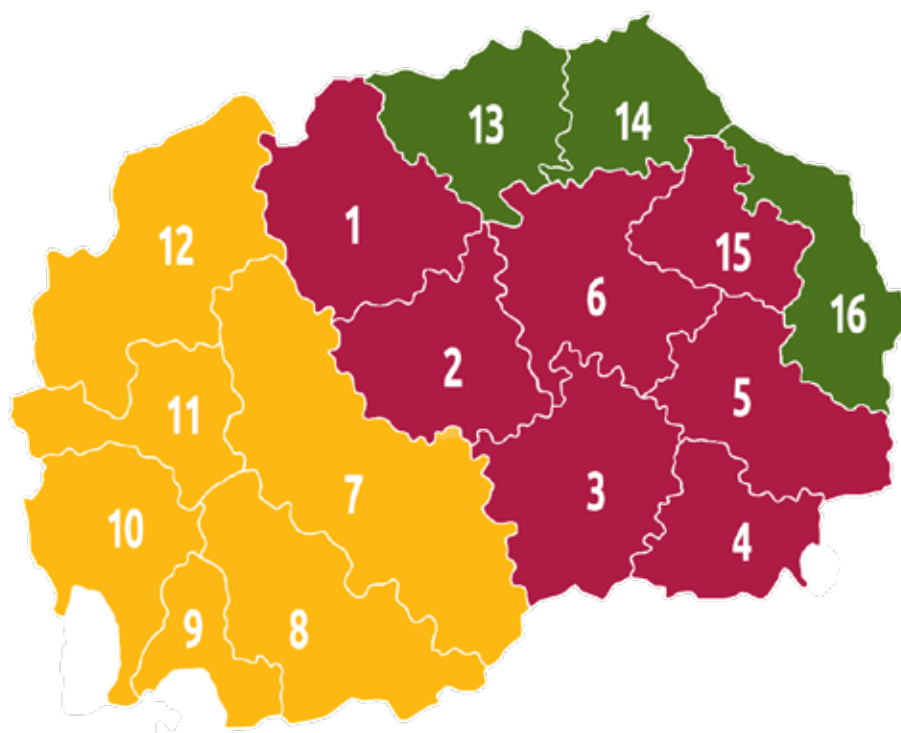
**The Central** wine region comprises the following winelands:

- » Skopje winelands
- » Veles winelands
- » Tikvesh winelands
- » Gevgelija-Valandovo winelands
- » Strumica-Radovish winelands
- » Ovce Pole winelands
- » Kocani-Vinica winelands

**The Western** wine region comprises the following winelands:

- » Prilep winelands
- » Bitola winelands
- » Prespa winelands
- » Ohrid winelands
- » Kicevo winelands
- » Tetovo winelands

**Image 4.** Winelands in the Republic of North Macedonia



**Winelands:** Skopje winelands (1), Veles winelands (2), Tikvesh winelands (3), Gevgelija-Valandovo winelands (4), Strumica-Radovish winelands (5), Ovce Pole winelands (6), Kocani-Vinica winelands (15), Prilep winelands (7), Bitola winelands (8), Prespa winelands (9), Ohrid winelands (10), Kicevo winelands (11), Tetovo winelands (12), Kumanovo winelands (13), Kratovo winelands (14) and Pijanec winelands (16).

## EASTERN WINE REGION (PCINJA-OSOGOVO)

The Eastern wine region accounts for approximately 4% of total production and includes 3 winelands: Kumanovo, Kratovo, Kocani and Pijanec. The vineyards are located at 440-850 metres above sea level and are planted on hilly and wavy fields, with moderately mild slopes with varying exposure. The climate is moderate continental with strong gusts of north winds. Over 110 days a year they have a temperature above 25 degrees. Precipitation averages 50 l/m<sup>2</sup>, with dry periods rarely occurring during vegetation. Vineyards are grown on different types of soil, the most common being diluvial, cinnamon and brown soils on limestone. This region extends to the north-western part of the Republic of North Macedonia and extends from Pcinja River to the west, to the Osogovo Mountains to the east. The Pcinja-Osogovo region includes the following winelands:

- » Kumanovo winelands – average temperature during vegetation reaches 16.6 degrees, and the average precipitation reaches 65 l/m<sup>2</sup>;
- » Kratovo winelands – temperature during vegetation reaches 16.6 degrees, and the average precipitation reaches 65 l/m<sup>2</sup>;
- » Pijanec winelands – the temperature during vegetation reaches 15.5 degrees, and the average precipitation reaches 55 l/m<sup>2</sup>.

## CENTRAL WINE REGION (POVARDARIE)

The Central wine region (Povardarie) is the largest and most famous wine region in the Republic of North Macedonia, producing approximately 83% of the Macedonian wine. The vineyards are at 50-500/600 metres above sea level and extend along the Vardar Valley and between the high mountain ranges that rise to the east and west. The climate is Mediterranean to continental, with mild winters and hot summers. The temperature is above 25 degrees for more than 124 days during the year. Precipitation averages 46 l/m<sup>2</sup> and is evenly distributed throughout the year. Vineyards are grown on different types of soil, the most common being diluvial soil (plain fields).

**Veles winelands** - It covers almost the entire area of the municipality of Veles. This southern winelands is influenced by the Mediterranean climate, while the north-northeast climate is influenced by the continental climate. The annual amount of rainfall is 43 l/m<sup>2</sup> and irrigation is required during vegetation. The vineyards are located at an altitude of 50-450 metres. The most common are the following types of soils: rendzinas, sirosemes, mulleys and cinnamon soils that are suitable for growing vines.

**Tikvesh winelands** - It covers the area of the Kavadarci, Negotino and Demir Kapija municipalities, as well as part of the municipalities of Prilep and Veles. These winelands belong to the plain and wavy fields between the Veles Canyon to the north and the Demir Kapija Canyon to the south. These landscapes are influenced by the Mediterranean climate to the south, the continental climate to the north and the mountainous climate, and such a combination creates ideal conditions for vine growing. The annual amount of rainfall ranges from 43-52 l/m<sup>2</sup>, and in summer irrigation is necessary. The whole winelands is covered with an irrigation system. The vineyards are wavy and hilly, with mild slopes suitable for growing vines, and are at an altitude of 110-55 metres. The following soils prevail: sirosemes, rendzinas and mulleys.

**Gevgelija-Valandovo winelands** - It covers the area with vineyards in the southern part of the Republic of North Macedonia, along Vardar River and the surroundings of Dojran Lake. It includes the vineyards of the municipalities of Gevgelija and Valandovo. These winelands are heavily influenced by the Mediterranean climate, and in the winter period along the Vardar Valley, the continental climate is present. The annual amount of rainfall is 54-75 l/m<sup>2</sup>, and in the summer period additional irrigation is required. Most of the vineyards are cultivated on mild slopes or along the plains of Vardar River, with different exposures suitable for growing vines. Some of the plantations are located at 50 metres above sea level.



**Strumica-Radovish winelands** - It occupies the surface of Struma and Strumeshnica Rivers, with Mediterranean climate impacts from the south, while from the north and northeast the influence of the continental air masses is present. It represents the vineyards on the surface of the most south-eastern part of the Republic of North Macedonia, that is, the area of Strumica and Radovish municipalities. The annual amount of rainfalls reaches 34-60 l/m<sup>2</sup>, and in summer irrigation is necessary. Part of the vineyard is covered by an irrigation system. Most of the plantations are on hilly soils, mild soils, and plains. The altitude varies from 224 to 380 metres, the most common being the diluvial soil.

**Ovce Pole winelands** - It occupies the surface of Sveti Nikole, Shtip, Probishtip municipalities and partly the municipality of Kocani. These winelands in southwest are influenced by the Mediterranean climate, and from the north it is influenced by the chilly air masses of the continental climate. It is characterised by hot summers and long cold winters and during the summer, dryness may occur. The annual rainfalls reach 34-56 l/m<sup>2</sup>. Large part of the wine land is covered with irrigation system. The greatest part of the plantations are grown on wavy soil with mild slopes or plain areas, and small part is grown on hilly and steep soil. The altitude above sea level ranges between 250 and 600 metres. The vine plantations are most frequently grown on mulleys, rendzinas and sirosemes.

**Kocani-Vinica winelands** - It occupies the surface of Vinica, Kocani and Probishtip municipalities. These winelands from southwest, along the river Bregalnica, are influenced by the Mediterranean climate, while along Kocani Valley, Zrnovska River and Osojnica River, the influence of the mountainous climate is present. The annual amount of rainfall is 45 l/m<sup>2</sup>. Most of the winelands is covered by irrigation system. Most of the plantations are grown on wavy soil with mild slopes, and a small part on wavy and steep soils. The altitude ranges from 250 to 600 metres. The vine plantations are grown on sirosemes and eroded diluvial soil.

**Skopje winelands** - It occupies the northernmost part of Povardarie, surrounded by high mountains. This Macedonian wine region is influenced by the Mediterranean and continental climate. The Mediterranean climate is present only along the Vardar River valley, while the influence of the continental climate is more expressed in the north and northeast. Summers are very hot, and winters are moderately cold, rarely very cold. The soil configuration is wavy and hilly, with mild slopes. Altitude ranges between 250 and 600 metres. The vine plantations are usually raised on sirosemes, cinnamon and mulch soils, which are very suitable for successful vine cultivation. The most common red wine varieties in this region are: Vranec, Merlot, Cabernet Sauvignon, Pinot Noir. Of the white varieties, the following are prevalent: Chardonnay, Belan, Muscat, Riesling, Sevignon Blanc, Temjanika, Zilavka, and others.



## WESTERN WINE REGION (PELAGONIJA-POLOG)

In this region, the vineyards are located at 600-680 metres above sea level and are planted on the banks and in wavy fields, with moderately mild slopes with southern exposure. The high mountain climate dominates, which is characterised by humid and cold winters and dry and hot summers. Over 87 days a year the temperature is above 25 degrees. Precipitation averages 57 l/m<sup>2</sup>. Vineyards are grown on different types of soils, the most common being brown soil. This region produces about 13% of the total wine production. The Pelagonija-Polog region includes the following winelands:

- » Prilep winelands – average air temperature is 16 degrees, and annual rainfalls reach 57 l/m<sup>2</sup>;
- » Bitola winelands – average air temperature is 16,7 degrees, and annual rainfalls reach 60 l/m<sup>2</sup>;
- » Prespa winelands – average air temperature is 14,2 degrees, and annual rainfalls reach 68 l/m<sup>2</sup>;
- » Ohrid winelands – average air temperature is 16, degrees, and annual rainfalls reach 71 l/m<sup>2</sup>;
- » Kicevo winelands – average air temperature is 16,4 degrees, and annual rainfalls reach 80 l/m<sup>2</sup>;
- » Tetovo winelands – average air temperature is 16,2 degrees, and annual rainfalls reach 69 l/m<sup>2</sup>.



## 2. Legal framework

The existing legislation in the Republic of North Macedonia that is in the interest of this study, we may divide into directly related to tourism and indirectly related to tourism. The analysis of the legislation set out below shows that laws from the moment of their adoption and up to today, have undergone numerous amendments and supplementations, in order to improve the regulation for the interests and needs of all stakeholders. Legislation that is directly related to tourism and relevant to this study is the following:

- » Law on Tourism Activity
- » Law on Catering Activity
- » Law on Tourism Development Zones
- » Law establishing the Agency for Promotion and Support to Tourism
- » Law on Auto Camps
- » Law on Mountainous Trails

In addition to the legislation and specific laws related to tourism, there are also a number of rule-books that regulate tourism and catering activity in the country, such as categorisation guidelines for catering facilities, followed by rulebook on traffic signs, equipment and signalisation related to tourist road signs leading to spa resorts, etc.

The wine legal aspects cover a very wide range of activities, such as the establishment of wineries, production, trade, taxation, and many others. The preservation of wines and their transportation are also linked to specific rules, due to the possibility of wine spoiling and reduction of its quality. Various countries in the world have introduced their own legislation related to wine production. At the European Union level there are regulations that control and regulate vine growing and wine production, such as the varieties of vines used in wine production, methods of production, level of alcohol, the use of sulphur dioxide, etc.





In the Republic of North Macedonia, the wine related legislation is the Law on Wine. This law regulates the planning and management of the production potential for wine grape production, wine production, wine market and trade, classification of wines, production, labelling and protection of wines with geographical name and description, labelling and protection of wine. The objectives of the Law on Wine are to protect the interests of wine grape and wine producers and wine consumers, to improve the quality of wine and other wine grape products and to have a good functioning of the internal and external wine grape and wine market. In addition to the Law on Wine, there are a number of rulebooks related to the wine production in the country.

### 3. Strategy papers

In addition to the legislation in our country, strategy papers (programmes and plans) for development at national, regional, and local level have been taken into account in the preparation of the Study. At the national level, the strategies related to tourism development and which in their content treat the wine tourism development were analysed, such as:

- » National Strategy on Tourism Development in the Republic of Macedonia, 2016-2020
- » National Strategy on Rural Tourism of the Republic of Macedonia, 2012-2017
- » Sub-Strategy on Traditions and events of the Republic of Macedonia

The National Strategy on Tourism Development has made the following analysis of wine tourism:

- » Due to its geographical location and favourable climate conditions, Macedonia has a long history of wine production
- » There are dozens of commercial wineries all over Macedonia and vineyards may be found all over the country
- » About 85% of the Macedonian wine produced comes from the Vardar Valley around the cities of Kavadarci and Demir Kapija
- » Well known wines are Vranec, Stanushina, Temjanika, Smederevka and Prokupec
- » The largest winery in Macedonia (Tikvesh) is located in Kavadarci
- » The landscape in the wine regions is classified as attractive

By implementing the economic potential of wine tourism, local wineries in the country have begun to create new tourism products (e.g. wine tasting, restaurants, guided tours). Currently it is mostly a one-day visit product, mainly due to the lack of accommodation facilities. The demand for wine tourism products is growing and most of the visitors are mainly domestic tourists.

According to the National Strategy on Rural Tourism, in the Republic of North Macedonia, the development of wine tourism as an integral part of the alternative form may be achieved through two specific measures:

- » Drafting tourism programmes “Wine way” for domestic and international visitors of organised visits to wineries and wine regions and tasting of traditional Macedonian food and wine, as well as viewing the production process of Macedonian wines, in cooperation with the wineries, chambers of commerce and local self-government units
- » Activities of diplomatic missions and promoters for active approximation to attracting international renown tour-operators, who would include the tourist wine offer of Macedonia in their programmes.

At regional level, the development programmes of the six planning regions were analysed, in which spa resorts are located, in the chapters relating to tourism and spa tourism. The following programmes were analysed:

- » Vardar Region Development Programme, 2015-2019
- » East Region Development Programme, 2015-2019
- » South-West Region Development Programme, 2015-2019
- » South-East Region Development Programme, 2015-2019
- » North-East Region Development Programme, 2015-2019
- » Skopje Region Development Programme, 2015-2019

At local (municipal) level, the Local Development (LED) Strategies were analysed of the municipalities in which the wine regions are located. In addition to LED Strategies, other strategy papers on development were analysed, such as rural development strategies, tourism strategies, wine tourism development strategies, development plans elaborated through various projects, and alike.



## 4. Overview and state of wine tourism in the Republic of North Macedonia

This chapter of the study addresses the matter related to the wine tourism development in the three wine regions of the Republic of North Macedonia. In addition to the analysis of wine regions and the capacities of wineries offering wine tasting and other tourism and catering services, wine events, wine museums, wine routes and wine shops were also included as essential factors for the existence and development of wine tourism. It should be noted that the potential of the country for the development of wine tourism is huge. Studies have shown that wineries that do not offer tasting at present are considering equipping such facilities, and some wineries are in the early stages of building such specialised facilities to accommodate tourists.

In the Republic of North Macedonia, according to the research conducted for the needs of this study, at present there are 28 wineries offering wine tasting for visitors and tourists. These wineries, to the greatest extent, are located in the Central Wine Region (24), three are located in the Western Wine Region and one is in the Eastern Wine Region.

The table below provides overview of the wineries that are open to tourist visits and offer wine tasting, that is, they develop wine tourism.

**Table 4.** Wineries offering wine tasting in the wine regions

Region	Winelands	Wineries
<b>Eastern Wine Region</b>	Kumanovo area	1
<b>Central Wine Region</b>	Skopje are	5
	Valandovo area	1
	Tikvesh area	14
	Veles area	2
	Ovce Pole area	2
<b>Western Wine Region</b>	Prilep area	1
	Ohrid area	1
	Bitola area	1
<b>Total</b>		<b>28</b>

It may be seen from the Table that Tikvesh winelands, in terms of wineries in the country that offer wine tourism through wine tasting is well ahead of other winelands with 14 wineries available to tourists. Following the Tikvesh winelands, Skopje winelands is ranked second, with 5 wineries offering wine tasting as a basic form of wine tourism. Veles and Ovce Pole winelands have two wineries each, and Kumanovo, Valandovo, Prilep, Bitola and Ohrid winelands have one winery each that may accept tourists. The country's wineries, in addition to tasting, accommodation, restaurants and conference opportunities, offer vineyard walks, acquaintance with the production process and technologies of wine production and storage, various tours and organised excursions to visit sites or activities in the region.



## 4.1. Wine tourism in the Eastern Wine Region (Pcinja-Osogovo)

In the Eastern Wine Region, the following wineries are operational: Kokino, Trickovik, Premium, Vekovnik, Nipro, Zemsil Rik Sileks, and others. In the forthcoming period, these wineries are planning to create conditions for wine tourism development, by organising tasting, walks around the wineries, acquainting with the wine production process, etc., which would make them attractive for the tourists. At the moment, only Kokino winery, located in Kumanovo, is offering wine tasting. This winery also disposes of accommodation facilities, restaurant, and conference room.

**Table 5.** Wineries offering wine tasting in the Eastern Wine Region

	Winery	Winelands	Tasting	Restaurant	Accommodation	Conferences
1	Kokino	Kumanovo	Yes	Yes	Yes	Yes

It may be expected that more wineries from the Eastern Region to equip their capacities and prepare those for acceptance of tourists, primarily for tasting, and later for accommodation, food, and supplementary services for the visitors.

In addition to wineries, what is also important for the wine tourism development are the natural and cultural prospects of the region.



**Natural prospects.** More significant natural prospects in the Eastern Wine Region are the following:

- » Opportunity for walks and hiking in German, Bilina Mountain, Osogovo Mountains with the peaks of Carev Vrv (2085 m) and Ruen (2252 m), as well as winter sports centre Ponikva, Plachkovica, Vlaina, Golak, Maleshevski Mountains, Ograzhden and several smaller mountains, which offer excellent opportunities for numerous sports and recreational activities;
- » Visit to Lesново Crater, located in the western part of Osogovo Mountains and one of the best-preserved fossil volcanic craters in the Republic of North Macedonia and the Balkan Peninsula;
- » Visit to one of the most unique occurrences of fossil volcanic relief in Macedonia, the famous “Basalt Plates” near Kumanovo;
- » Visit of stone dolls at the site “Kuklici”;
- » Visit to Berovo (Ratevsko) Lake.

**Cultural prospects.** Of the cultural prospects in the Eastern Wine Region, we would distinguish the following:

- » Visit to the archaeological site Golemo Gradishte in the village of Konjuh, a fortified settlement from the late antiquity period and the Middle Age;
- » Visit to the towers and bridges in Kratovo;
- » Visit to Megalithic Observatory “Kokino”;
- » Visit to Cocev Kamen;
- » Visit to the Zebrnjak memorial ossuary near to Staro Nagoricane;
- » Visit to some of the most important monasteries in this region: the Karpinci Monastery or Prolegomenon of the Holly Mother of God near the village of Orah, Kumanovo; Zabel Monastery or Dormition of the Holly Mother of God, located in the triangle between the villages of Nikuljane, Staro Nagoricane and Celopek; St. Gjorgi Church in Staro Nagoricane; the St. Joachim Osogovski Monastery in Kriva Palanka; Lesново Monastery; St. Archangel Michael Monastery in Berovo, St. Bogorodica – Balaklija Church in Delcevo, etc.



## 4.2. Wine tourism in the Central Wine Region (Povardarie)

The Central Wine Region is the most developed wine region in the country, and as such, it contains most of the wineries offering tasting to tourists. The Table below provides basic data on the 24 wineries offering tasting in the Central Wine Region.

**Table 6.** Wineries offering tasting in the Central Wine Region

	Winery	Winelands	Tasting	Restaurant	Accommodation	Conferences
1	Brzanov	Skopje	Yes	No	Yes	No
2	Kartal	Skopje	Yes	Yes	No	No
3	Kuvin	Skopje	Yes	Yes	No	Yes
4	Skovin	Skopje	Yes	Yes	No	No
5	Chateau Kamnik	Skopje	Yes	Yes	Yes	Yes
6	Valandovo	Valandovo	Yes	Yes	No	No
7	Bovin	Tikvesh	Yes	Yes	No	No
8	Venec	Tikvesh	Yes	Yes	No	Yes
9	Domen Barovo	Tikvesh	Yes	Yes	Yes	Yes
10	Domen Lepovo	Tikvesh	Yes	Yes	Yes	Yes
11	Kralica Marija	Tikvesh	Yes	Yes	Yes	Yes
12	Lazar	Tikvesh	Yes	Yes	Yes	Yes
13	Movino	Tikvesh	Yes	No	No	Yes
14	Pivka	Tikvesh	Yes	No	No	Yes
15	Popov	Tikvesh	Yes	Yes	No	No
16	Popova Kula	Tikvesh	Yes	Yes	Yes	Yes
17	Puklavec	Tikvesh	Yes	Yes	No	Yes
18	Stobi	Tikvesh	Yes	Yes	No	Yes
19	Tikvesh	Tikvesh	Yes	Yes	No	Yes
20	Trajkovski	Tikvesh	Yes	Yes	No	Yes
21	Tristo	Veles	Yes	Yes	No	Yes
22	Chateau Sopot	Veles	Yes	Yes	No	Yes
23	Imako	Ovce Pole	Yes	Yes	No	No
24	Ezimit	Ovce Pole	Yes	Yes	No	No

It may be seen from the Table that most wineries, that is, 21 of them dispose of restaurant facilities (with the exception of 3 wineries), accommodation is offered by only 7 wineries, and 16 wineries dispose of conference facilities. In the future, it is expected that Central Region wineries to increase their accommodation facilities in line with the growing demand for wine tourism, as well as introduce additional services such as conference rooms where various events would be organised.

In addition to the wineries, the natural and cultural prospects of the region are also important for wine tourism development



**Natural prospects.** Most significant natural prospects of the Central Wine Region are the following:

- » Opportunity for walks and hiking through one of the most beautiful mountains and mountain ranges in North Macedonia, Vodno Mountain, Skopska Crna Gora, Jakupica Mountain Range, Kozhuf Mountain with its Ski Center, Belasica Mountain etc.;
- » Visit to Matka Canyon, monument of nature;
- » Visit to Jasen Nature Reserve, a site with remarkably rich flora and fauna;
- » Visit to Tikvesh Strict Nature Reserve;
- » Visit to the Demir Kapija Canyon, monument of nature;
- » Visit to some of the caves in this region: Vrelo Cave, the deepest underwater cave in Europe; Bela Voda Cave, one of the longest in North Macedonia – Makarovec Cave; Upper Zmejovec Cave; Aramiska Cave; Damjanica Cave; Crkviche Cave; etc.;
- » Visit to the Gjavolski Zid (Devil's Wall), a natural geomorphological occurrence on the southern slopes of Bogoslovec Mountain;
- » Visit to the village of Klisura and the Valley of Cacti, near to Demir Kapija;
- » Visit to Dojran Lake, which is protected by the Law on Lakes in the Republic of Macedonia and is one of the three largest natural lakes in Macedonia, covering an area of 42.74 km<sup>2</sup>;
- » Visit the Smolare and Kolesino waterfalls, one of the largest and most attractive in North Macedonia;
- » Visit to the thermal springs and spas: Katlanovska Spa, Bansko Spa and Negorski Spa.



**Cultural prospects.** Of the cultural prospects in the Central Wine Region, we would distinguish the following:

- » Visit to the ancient city of Skupi, located about 5 km northwest of Skopje;
- » Visit to the archaeological site of Skopje Fortress;
- » Visit to the Roman Aqueduct;
- » Visit to the ancient city of Stobi, whose name was first mentioned in 197 BCE;
- » Visit to the ancient city of Bargala, near the village of Karbinci, Shtip area;
- » Visit to the archaeological site Vinichko Kale, famous for its terracotta icons;
- » Visit to the medieval Isar fortress in Shtip;
- » Visit to the archaeological site of Vardarski Rid, for which the findings say that it originates from the Bronze Age and possibly from an older age. This site was one of the most powerful early antiquity cities in the whole Povardarie region;
- » Visit to some of the most significant monasteries in this region: St. Panteleimon Monastery in Nerezi; St. Andrej Monastery in Matka; Markov Monastery or St. Dimitrija Monastery in the village of Sushica; St. Nikola Monastery in the village of Shishevo; St. Nikita Monastery in the village of Gornjane; St. Ilija Gorni Monastery near to the village of Banjani; St. Gjorgji Monastery, more known as Polog Monastery near to Kavadarci; St. Nikola Cave Church (known as Marko's Church), located near the Kavadarci village of Dradnja; Vodocha Monastery, with the monastery church dedicated to St. Leontie; St. Mother of God Eleusa (Merciful) Church in the village of Veljusa and many others.





### 4.3. Wine tourism in the Western Wine Region (Pelagonija-Polog)

In the Western Wine Region there are several wineries, but at the moment, only three wineries – Mal Sveti Kliment (Ohrid), Pirgan (Prilep) and Chiflik (Bitola) are offering wine tasting and are open to tourists. A complete tourist service is offered by Chiflik winery, which, in addition to tasting, is offering accommodation, restaurant and conference facilities. Mal Sveti Kliment winery has no accommodation, and Pirgan winery does not dispose of accommodation and conference capacities.

**Table 7.** Wineries offering tasting in the Western Wine Region

	Winery	Winelands	Tasting	Restaurant	Accommodation	Conferences
1	Mal Sveti Kliment	Ohrid	Yes	Yes	No	Yes
2	Chiflik	Bitola	Yes	Yes	Yes	Yes
3	Pirgan	Prilep	Yes	Yes	No	No

In addition to wineries, of importance for the wine tourism development are also the natural and cultural prospects of the region.

**Natural prospects.** More significant natural prospects of the Western Wine Region are the following:

- » Opportunity for walks and hiking through the three national parks in the Republic of North Macedonia. Pelister National Park is the first proclaimed as protected natural heritage in the Republic of Macedonia in 1948. The Mavrovo National Park, with its extraordinary floristic abundance, was proclaimed a national park in 1949. While Galicica National Park was proclaimed a national park in 1958 and within the NP Galicica there is also a natural rarity, the Golem Grad Island in Prespa Lake, which covers an area of 1 km<sup>2</sup>. All three national parks have immense national, European, and global significance;
- » Visit to some of the mountains in this region, such as Korab (2764) which has 12 glacial lakes, attractive river valleys with gorges and canyons, rapids, waterfalls, rich vegetation etc.; Shar Mountain (2747), a typical alpine mountain with high and steep peaks, 27 mountain lakes, high waterfalls, 100 springs, etc.; Baba, with the highest peak Pelister (2,601 m), where both the glacial Great Lake and Little Lake - the Pelister Eyes, or so-called Gorski Ochi, then the Jablanica, Galicica, Nidze, and many others;
- » Visit to the largest and most significant natural lake in Macedonia, Ohrid Lake, which is also the oldest lake in Europe;
- » Visit to Prespa Lake, the second largest natural lake in the country;
- » Visit to the artificial Mavrovo Lake;
- » Visit to the Ezerani Nature Reserve, located on the northern shore of Prespa Lake. It covers an area of 2080 hectares, and was declared a protected reserve in 1996;
- » Visit to the Markov Towers Monument of Nature, located near Prilep, consisting of numerous denudate forms representing outstanding relief sculpture;
- » Visit to some of the caves in this region: Sharkova Dupka on Bistra, Gjonovica or Ubavica on Bukovic Mountain, Ramniste; Samoska Dupka; Slatino Spring, Peshna, etc.;
- » Visit to Radika Canyon;
- » Visit to Biljana Springs and Vevcani Springs;
- » Visit to Debar Spas;
- » Visit to the waterfalls: Duff, Belovishki, etc.

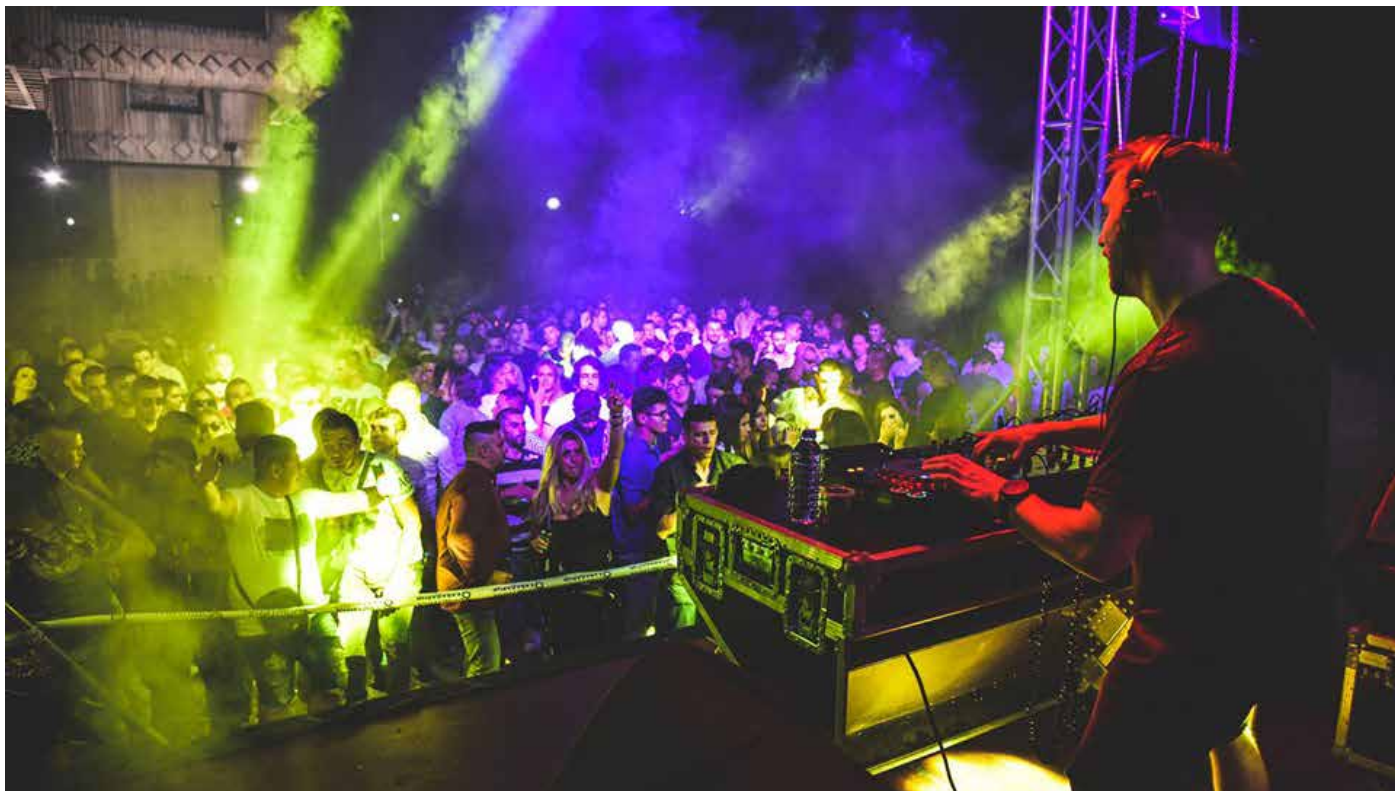


**Cultural prospects.** From the cultural prospects of the Western Wine Region, we would highlight the following:

- » Visit to the ancient city of Heraclea Lyncestis, founded by Philip II in 349, BCE
- » Visit to the ancient city of Stibera, which is mentioned for the first time in historical sources in 200 BCE;
- » Visit to the Samoil Fortress - a medieval fortress in the city of Ohrid, originally built by King Philip II of Macedonia, and later named after the medieval Emperor Samoil;
- » Visit to the Ancient Theatre - archaeological site from the end of 3rd century to the beginning of 2nd century BCE in the city of Ohrid;
- » Visit to Marko's Towers, a medieval fortress town, near Prilep;
- » Visit to the Tetovo Fortress or Isar - a fortress of late antique and medieval times, located on the top of Baltepe, just above Tetovo;
- » Visit to the Colourful Mosque in Tetovo;
- » Visit to the Bay of Bones site near Ohrid;
- » Visit to some of the most significant monasteries in this region: the monasteries "St. Jovan Bigorski" and "St. Gjorgji the Victorious" near Debar; Clement's Church of Plaoshnik, Church of St. Jovan the Theologian Kaneo, Church of St. Sofia" in Ohrid; the monastery "St. Naum Ohridski "near Ohrid; Monastery of "St. Mother of God - Purified" near Kicevo; Porec Monastery, monastery complex above the village of Gorni Manastirec, near Makedonski Brod; the monastery "Dormition of the Most Holy Mother of God - Treskavec", located under Zlatovrv, ten kilometres north-west of Prilep, the monastery "St. Preobrazenie", in the village of Zrze, which originates from the 13th century; the monastery "St. Arhangel Mihail" in Varosh; the monastery and church "St. Gjorgji "in Kurbinovo, for which the assumption is that it originates from the end of the 12th century; the monastery "St. Jovan the Baptist" from the 14th century, near the village of Slepche; churches "St. Peter", "St. Ilija" and "St. Petka", on the island of Golem Grad and many others.

## 4.4. Wine events

The wine events are a significant segment of the wine tourism, and as more significant events in the Republic of North Macedonia, we would single out the wine festivities, wine fairs and wine bazaars.



As one of the most famous wine festivities in Macedonia, we would mention the Tikvesh Vintage (orig. Tikveshki grozdober). The Tikvesh vintage is a continuation of a long and rich tradition that has been held in this area for centuries, when “Dionysius Days” were held in honour of the God of wine Dionysus and the vine. These festivities lasted for several days and were attended by the entire population (both free citizens and slaves). The people in these areas lovingly cultivated and nurtured this culture, as evidenced by the numerous tombstones, mosaics and reliefs of the numerous archaeological sites in Tikvesh. In the Middle Ages, viticulture continued to be nurtured in these areas, with its main centres being church and monastery estates, where the most beautiful wine was produced. With the arrival of the Ottomans, its production stagnated, as the Qur’an bans the use of alcoholic drinks.

In 1964, the Kavadarci municipal leadership organised the first “Tikvesh Vintage”, an event of economic, cultural and tourism character. Each year representatives of the vintage are selected: a king, a queen, and their companions. Carnival procession participants are mostly students from Kavadarci schools. Every year, the defile is enriched by guests: ensembles and art companies from the Republic of North Macedonia and abroad. Traditional grape pruning is done during the day, food and wine tastings are organised on Kavadarci Square. In the evenings there are a number of concerts featuring famous bands and artists from the Republic of North Macedonia and the Balkans.

**Skopje Wine Expo.** As an example, we would point out the wine bazaar that has been organised for more than ten years in Skopje - Vinoscope. For the first time in 2007, the International Vinoscope Wine Festival took place in Skopje. The event was organised on the quay “13 November”, and the event featured 20 Macedonian wineries. During the Festival there was a professional tasting, where wines from Macedonian wineries were assessed by three international and two domestic judges. Since then, the event has traditionally been taking place every year, in two seasons: summer and winter. The event has a rich art and music programme that accompanies it and lasts for several days. Since 2018 the event has been renamed into “Skopje Wine Expo”.



**St. Trifun.** An opportunity for an unusual and unique experience is to mark the day dedicated to Saint Trifun, the patron saint of grapevine and wine. St. Trifun is celebrated in every village and town in the Tikvesh region where the grapevine is grown. It usually begins with a morning liturgy in Orthodox temples, where the ritual pruning of the grapevine is performed, with people taking a piece of the consecrated vine, which they believe will provide good luck and a good harvest for that year. On this day, all wineries are open to guests and passers-by. The most famous events of this kind are the following events: “St. Trifun” in Kavadarci, Wine Week “St. Trifun” in Negotino and the event “St. Trifun” in Demir Kapija.

**Skopje Wine Salon – “Vinodonija”** is a wine event of educational character in Macedonia, aiming at raising the wine culture in the country and developing our wine region. Except for wine tasting, it includes tasting of most diverse domestic and imported cheese, delicatessen, olive oils, etc., and within the event, educational workshops and lectures take place. It exists since 2016 and was organised by the Association of Sommeliers of the Republic of Macedonia.

**Vino Fest** is an event which was firstly held in 2012. It is traditionally organised by Veropulos company and aims at promoting domestic wine producers and at the same time, offer visitors enjoyment in top wines and delicatessen.

**The Wine and Cheese festival** is traditionally held in the city of Ohrid. This festival offers an excellent opportunity for local wine and cheese producers to present their products on the market. The festival is basically a mini fair featuring wine and cheese as part of the traditional Macedonian gastronomy.

**The Festival of Old Town Music and Wine** is organised within the framework of Bitola Cultural Summer “Bit Fest” in Bitola. It is traditionally held in the Old Bazaar of Bitola, where a certain winery is promoted through old-town music.

**Vranec Day** is an event organised by the Association Producers and Exporters of Wine and other Beverages made of grapevine, "Wines from Macedonia". The event aims at making popular Vranec variety and organise tasting of wines produced by this variety. Also, through this event, the importance of local varieties is highlighted, and the consumers' awareness is raised around the world, referring to wines originating from the Republic of North Macedonia.



**Tikvesh Wine Regatta** is an event organised as of 2012 by the Association for Fostering and Development of Wine Culture, Wine Tourism and Grape Products "Vinotek" from Kavadarci. Boats and kayaks pass part of the Macedonian wine route, on which rafters would bring wine to Thessaloniki. In the two-day regatta, there are some 60 participants from around the country and abroad, admirers of nature and high-quality wine. The regatta unites wine, recreation, and culture, as wineries, monasteries and archaeological sites are visited. For the greatest adventurers, an interesting game is organised. Participants get maps and look for the hidden treasure in the vineyards, and the treasure is of course a wine, which is a reward for the one who finds it. Regatta includes visiting Gradsko, Kavadarci, Negotino and Demir Kapija and includes one overnight stay. It is taking place along Vardar River and Tikvesh Lake.

## 4.5. Wine museums

There is a high number of museums in the wine regions around the Republic of North Macedonia, in which artefacts may be found, related to wine culture. As most significant ones, we would single out the museums located in the Central Wine Region.



**Wine Museum in Demir Kapija.** The wine museum located in Demir Kapija, in the yard of the primary school “Dimce Angelov Gaberot” is one of the few museums worldwide dedicated to wine, as well as to wine archaeological exhibits. In the abundant museum collection, there are some of the oldest exhibits of the kind, such as crystal wine jug, which belonged to the Austrian Queen Maria Theresa, as well as a cup – the glass of Lui the 14th, which is handmade, and hand decorated with floral motifs. The wine museums disposes of several exhibitions, such as:

- » The archaeological gallery with a display of objects that speak of the continuity of life from prehistoric to medieval times in the space of the Tao-Tej Stenae, Stena - Stenae, Intersection - Demir Kapija.
- » Wine gallery displaying diverse types of pots, bottles, bowls from around the world that reflect and display the wine consumption culture and exhibit wooden vaults for wineries in the Tikvesh wine region.
- » An art gallery featuring a hall that presents 18 hours of audio-visual archive footage from Demir Kapija’s archaeology, history, and natural rarities.
- » Historical gallery where visitors may experience the long tradition of the city of kings in the valley of Paeonia rulers.

In the museum displays there are various exhibits with different periodisation. Different periods appear, distinctive styles, shapes, and craftsmanship, yet they have one purpose - serving and consuming wine. As one of the oldest exhibits are wine bowls dating from the third century BCE, they were filled with wine, which was further served from these bowls.

**Negotino Museum.** The municipal institution Negotino Museum was established in 1978, under the Resolution of the Municipality of Negotino and it is an institution operating in the field of culture. The Museum of the City of Negotino is a cultural, educational and science institution, which through systematic research, collection, arrangement, professional and scientific procession and examination, protection, conservation, publication and presentation of the museum materials, disseminates education on cultural heritage, permanently satisfying the cultural needs of the working people and citizens and contributing for the advancement of the professional and scientific-research operation and development of culture, science, education, and other activities. The Museum of the City of Negotino is a museum of general character, that is, a complex museum, which organises its work through organisational units - departments:

- » Archaeology Department;
- » History Department;
- » Ethnology Department;
- » Fine Art Department.

The first exhibition was organised in 1978 and it contained materials from the fine art creations of the famous artist Dimce Protugjer. The facility has an exhibition space of 450 m<sup>2</sup> for permanent museum exhibitions and about 100 m<sup>2</sup> for occasional exhibitions. In 2008 a part of additional 200 m<sup>2</sup> was granted as a donation from the Italian Embassy through the Tikvesh Wine Route Foundation, for the purpose of wine tourism development. Today in this area, the ethnological-wine display is placed, and in the lower part there is the Lapidarium which contains part of the collection of stone plastic in the Museum of the City of Negotino.

**Wine Gallery in Negotino.** The wine gallery is located in the complex of the monastery of St. Gjorgji in Negotino. The rich tradition of wine cultivation are the most characteristic features of this region. There are numerous archaeological and ethnological objects related to viticulture and wine-making that are housed in the Wine Gallery. In addition to this facility there is an exhibition - sale section where you can find the highest quality varietal wines produced in our famous wineries.

**Kavadarci Museum.** The Museum Gallery of Kavadarci is a non-profit organisation in the field of culture that exists since 1973. Its main task and activity is to collect, research, arrange, expertly and scientifically process, study, protect, preserve, publish, and present museum objects in all areas of museum activity. The Museum Gallery is an institution open to the public, and it plays educational role to attract wider audience from all society classes. It also aims to develop interactive communication with visitors to popularise movable and immovable cultural heritage. The Museum Gallery is a general museum and it has several departments: the Archaeological, Ethnological, Historical, Art History and Gallery departments, where dozens of exhibitions take place annually.



The Museum of Kavadarci Gallery also includes the Museum of “Items and Materials for the Production and Processing of Traditional Tikvesh Food” which opened in 2013. There are five departments or permanent exhibits in this museum: Archaeological, Wine, Ethnological, Vasil Hadzimanov Memorial Room and Nikola Badev Memorial Room.

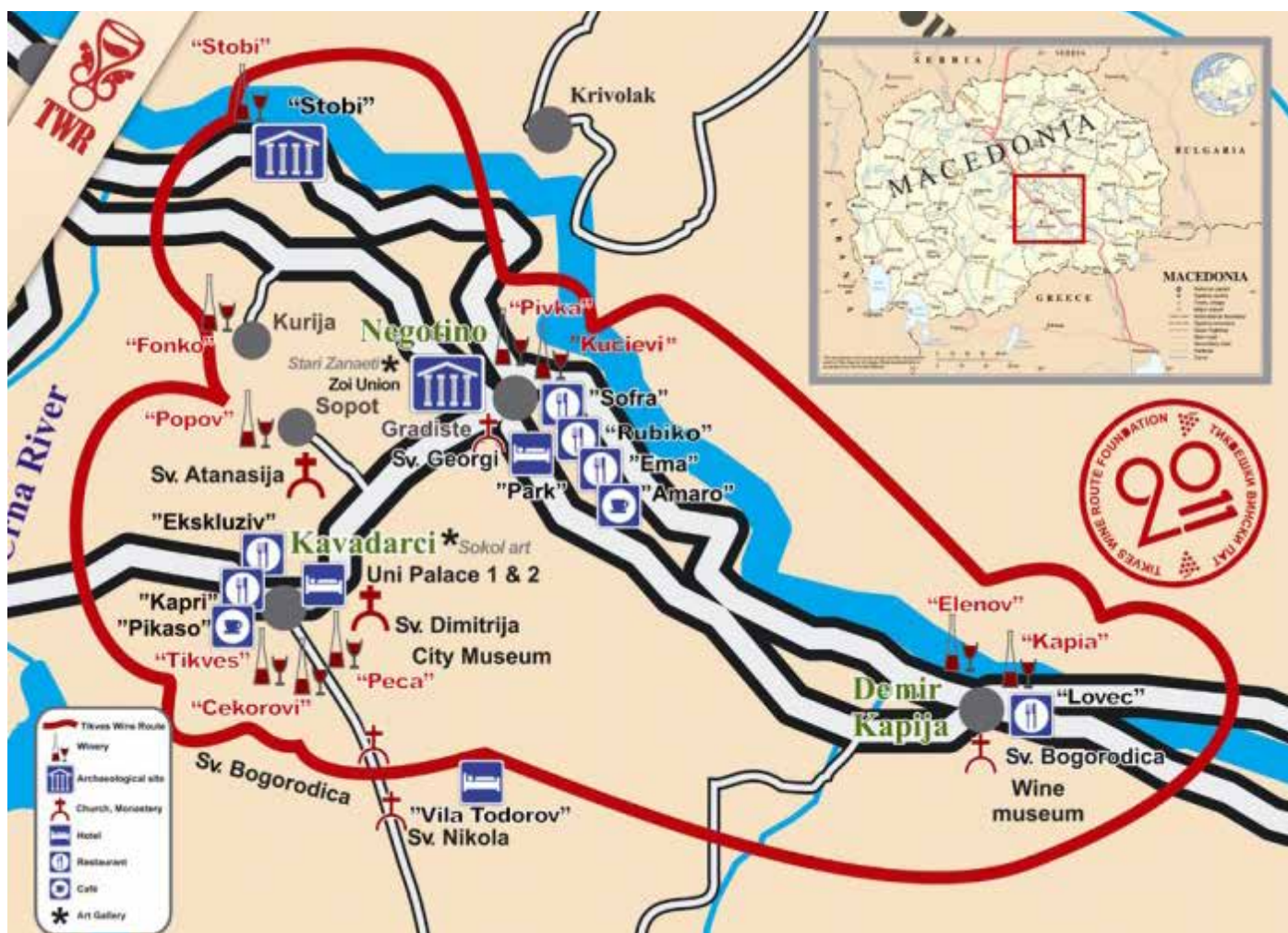
The museum displays more than 500 items and exhibits related to food production and processing, as well as equipment and tools for processing and producing traditional Tikvesh food. The exhibited objects date from the Neolithic period, 4,500 BCE and up to the 20th century. They are made of stone, wood, ceramics, metal, and glass. The setting is enriched with a masculine and feminine folk costume reflecting the Tikvesh ethnic region. The museum also shows us how traditional Tikvesh food is produced, which is largely due to the abundance of Tikvesh region in plant fruits, such as wheat, barley, poppy, rye, oats, and vines.

The main idea of the museum is to, by means of objects, materials, and photos, to present the objects and equipment for production and preparation of food through the centuries in Tikvesh region. In the first part of the exhibition they present the use of tools and vessels for production and preparation of food since prehistoric or Neolithic times. In some of the Neolithic sites found in Tikvesh as “Cakovec” near the village of Resava, carbonated seeds of several varieties of wheat and barley, then oats, as well as apple, cherry and wild grape seeds have been discovered in this area. According to previous research and according to osteological material, the use of sheep and goat meat dominated, and pig and cattle meat was also used. Together with them during the Neolithic period, wild animal and bird meat was used.

## 4.6. Wine routes

In the Republic of North Macedonia, a Tikvesh Wine Route Foundation has been established for the following purposes:

- » Developing alternative tourism;
- » Developing wine routes in the Republic of North Macedonia;
- » Establishing standards and criteria for functioning of Wine Routes in the Republic of North Macedonia;
- » Developing necessary infrastructure for the functioning of the wine routes;
- » Promoting wine routes in the foreign markets;
- » Networking in international wine route networks;
- » Education in tourism and catering;
- » Developing alternative tourism in Tikvesh region;
- » Sustainable and rural development



The Tikvesh wine route covers the Tikvesh region with the cities of Kavadarci, Negotino and Demir Kapija. The Tikvesh wine route is a tourist attraction filled with events and experiences. This product is not only delicious wine and endless plantations, but also a mix of culture, nature, and tradition, typical of the Tikvesh region. Visitors may visit the vineyards, taste diverse types of wine in many wineries, try traditional Macedonian specialties, get acquainted with the cultural and historical heritage and enjoy the natural beauty. All complemented by top-notch catering services and professional guides and sommeliers that provide a top-notch experience for guests. One-day and multi-day tours, cooking lessons, tastings and the like are organized for the needs of the visitors.



## 4.7. Wine stores

Macedonian wines may be found in all well-supplied shops and stores. Tikvesh winery has its own shops in Skopje and Kavadarci.



**Kamnik** winery has its own store - Kamnik wines store, located in Skopje centre, offering wide assortment of the entire selection of wines from the winery Chateau Kamnik, as well as glasses, decanters, and other wine products from the known brand Riedel.

**Skovin** winery has its stores in several locations around the Republic of North Macedonia, as follows:

- » Skovin Store in Avtokomanda
- » Skovin Store in Kapishtec
- » Skovin Store at Stara Rampa (Old Ramp)
- » Skovin Store in Ristikeva Palace
- » Skovin Store in Aerodrom
- » Skovin Store in Bitola

Wine stores are an important segment of the wine tourism, as tourists may purchase wine either as a souvenir and take it to their native countries, or wine they may consume during their stay.

### III. MEASURES AND RECOMMENDATIONS FOR FUTURE ACTIVITIES

The study proposes measures and recommendations for further activities related to wine tourism and wineries, such as harmonisation of legislation related to winemaking and tourism, promotion of wineries, potential locations for information boards and signposts and potential locations for new wine centres provided in the text below.

#### 1. Measures and recommendations for harmonisation of legislation

Regarding the harmonisation of the legislation that is directly and indirectly related to the study, there are some shortcomings that should be supplemented the future.

First of all, the status of wine tourism should be regulated and supplemented under the applicable Wine Law. This initiative should be implemented by the Wine Association and the Ministry of Agriculture, Forestry and Water Economy and the Department of Viticulture, Wine Production and Fruit Growing and the Rural Development Sector, given that most of the wineries are located in rural areas.

On the other hand, the regulation of wine tourism should also be included in the Law on Tourism. In the countries of the region, wine tourism is of immense importance and it is included in the legal regulations.

#### 2. Measures and recommendations for future promotion of wine tourism

The study analyses the wine tourism in the Republic of North Macedonia. The promotion of wineries and wine tourism in the country may be done in several ways:

- » International promotion through participation in wine and tourism fairs and joint offer of wineries and tourism economy of the country;
- » Promotion of the official website for tourism promotion of the Republic of North Macedonia and the Agency for Promotion and Support of Tourism (APST), has only 7 wineries presented on its website;
- » Development of promotional materials such as brochures and tourist guides for wine tourism in the country;
- » Regional promotion, through membership in regional and international wine tourism organisations and associations; and
- » Local promotion through the official websites of the municipalities, regions, and wineries.

On the other hand, this Study, that aims at analysing wine tourism, may be distributed and offered to domestic and foreign investors who are interested in investing in potential and existing wineries through electronic media, setting up official web sites of institutions, social networks, dissemination of printed materials at international wine and tourism fairs, international conferences and conventions, business meetings, through international associations and wine tourism associations, embassies and consular representations, etc.

### 3. Potential locations for new wine destinations

In the analysis developed for the needs of the Study, it was noted that, in addition to the Central Wine Region, containing 24 wineries, the capacity of the wineries for wine tourism development in the remaining two regions, was insufficiently used.



The field research conducted for the needs of the Study, which needs to determine the potential locations for construction of future wine centres in favour of the wine tourism, the following centres are deployed in the Republic of North Macedonia:

- » **Eastern Wine Region.** This region has only one winery offering tasting for tourists. It is recommended that the remaining wineries from the two other winelands are included in the wine tourism offer.
- » **Western Wine Region.** In the Western Wine Region, activities relating to wine tourism may be noted in Ohrid, Bitola and Prilep. It is recommended that the remaining wineries of this region should be included in the wine tourism offer, as well as construction of wine centres also in the other winelands which are lacking those, and there are conditions for grape growing and wine production.
- » **Central Wine Region.** This region has 24 wineries offering tasting, but this number may be increased by means of construction of appropriate tourist infrastructure by the existing wineries, as well as opening of new, in accordance with the region's potential. In addition to Skopje and Tikvesh winelands, locating such centres also in the other winelands is recommended.

In support of the development of wine tourism and new wine centers, it is of great importance to educate staff for the development of wine tourism in formal and non-formal education, to educate tourist guides on wine tourism, to develop tourist package arrangements for wine tourism by touristic agencies, development of a national wine tourism strategy, etc.

## 4. Potential locations for placement of information boards and road signs for wine tourism

According to the Law on Road Traffic Safety, the Ministry of Transport and Communications in cooperation with the Ministry of Interior has prepared a Rulebook on Traffic Signs, Equipment and Signalling. According to this Rulebook, tourist signs and other signalling are intended to inform traffic participants of cultural, historical, natural and tourist landmarks and other facilities and contents in the settlements.



Regarding tourist road signs intended for wine tourism and wineries, there are currently road signs marking Tikvesh and Stobi wineries (set up on the E75 international highway), as well as signs for Tikvesh wine route (located in the vicinity of Kavadarci), as well as separate tourist signs located near wineries on different routes across the country.

Research for the needs of this study have shown that better road signalling and labelling of wineries and wine tourism in the country is needed, as well as replacing existing and old tables with new ones. The recommendation is to place road signs for wine tourism in several locations, which would mark the approaches to wineries, wine museums, in various locations such as:

- » Central region (Skopje, Kavadarci, Negotino, Demir Kapija, Shtip, etc.)
- » East region (Kumanovo, Kratovo, etc.)
- » West region (Prilep, Bitola, Ohrid, Sturga, etc.)

Improvement of road signalling would contribute to increased visits, promotion of wineries and wine tourism and better navigation in space by the hosts, particularly by international travellers and foreign tourists.

## ANNEXES

### Questionnaire for wineries and wine tourism

Name of winery	
Year of formation	
Municipality	
Contact telephone (landline/mobile)	
Address	
Website	
E-mail	
Traffic connection (explain how to reach the winery)	
Parking facilities	
Production capacity in litres	
A brief history of the winery (up to 500 words)	
Working hours (weekdays and weekends/holidays)	
Tasting possibility (up to 500 words)	
Accommodation (number of rooms and beds)	
Conference facilities (up to 500 words)	
Restaurant facility (number of tables and chairs)	
Nearby tourist facilities (accommodation, food, etc.)	
Nearby tourist attractions (nature, cultural monuments, events, etc.)	
Supplementary activities in the winery	
Other important aspects related to the winery	
Organisation of tours for the visitors by the winery (description of tours, up to 500 words)	

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