



Overview of current situation in wine sector in North Macedonia

Data source:

Ministry of Agriculture, Forestry and Water economy

Customs Administration

State Statistical Office

Tirana, 18-20 October 2022

Adopted new legal acts

ACTION TAKEN:

1. Three (3) workshops were held with a working group for drafting the Law on wine (December 2021; March 2022; April 2022)
2. The new Law on wine has been prepared
3. The new Law on wine is put on ENER (National electronic system) for public information and comments

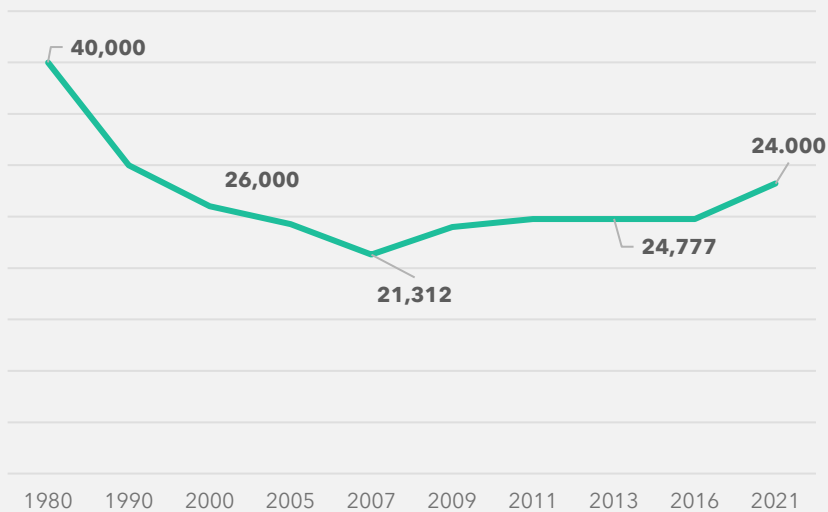
NEXT STEPS:

- After ENER, one workshop will be required for finalization with correspondence tables (November 2022)
- the new Law on wine has to be submitted to the Government and Parliament for adoption
- New rulebooks (apx. 46) has to be prepared (2023) - 6 months after the adoption of the Law on wine
- Several workshops will be needed for preparation of rulebooks

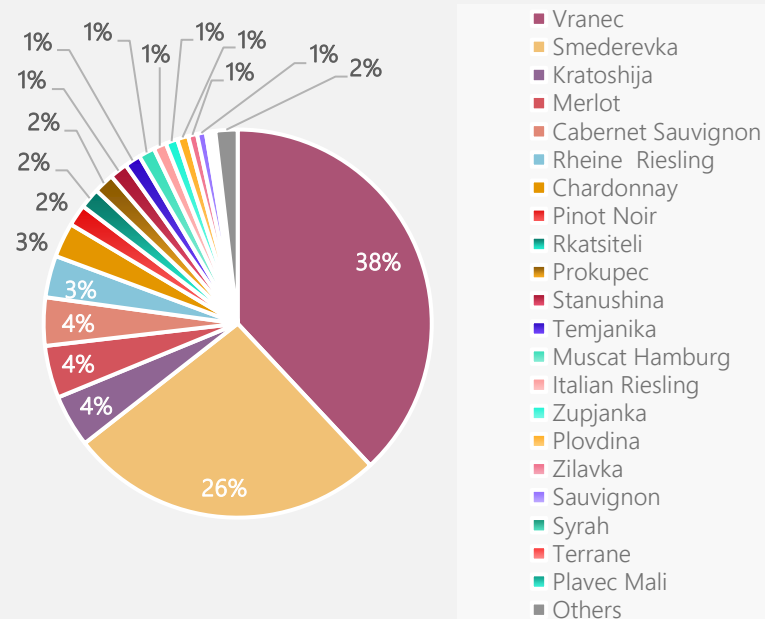
VINEYARDS

- Total vineyards area: 23.776ha
- 85% wine varieties / 15% table grapes
- 65% of the vineyard area is planted with Vranec and Smederevka
- 84 wine varieties planted

Vineyards area per year in ha

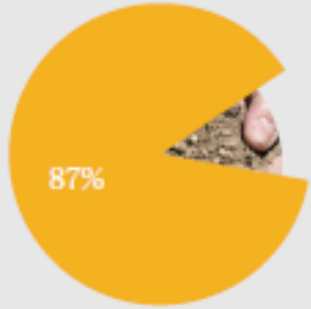


Share of wine grape varieties



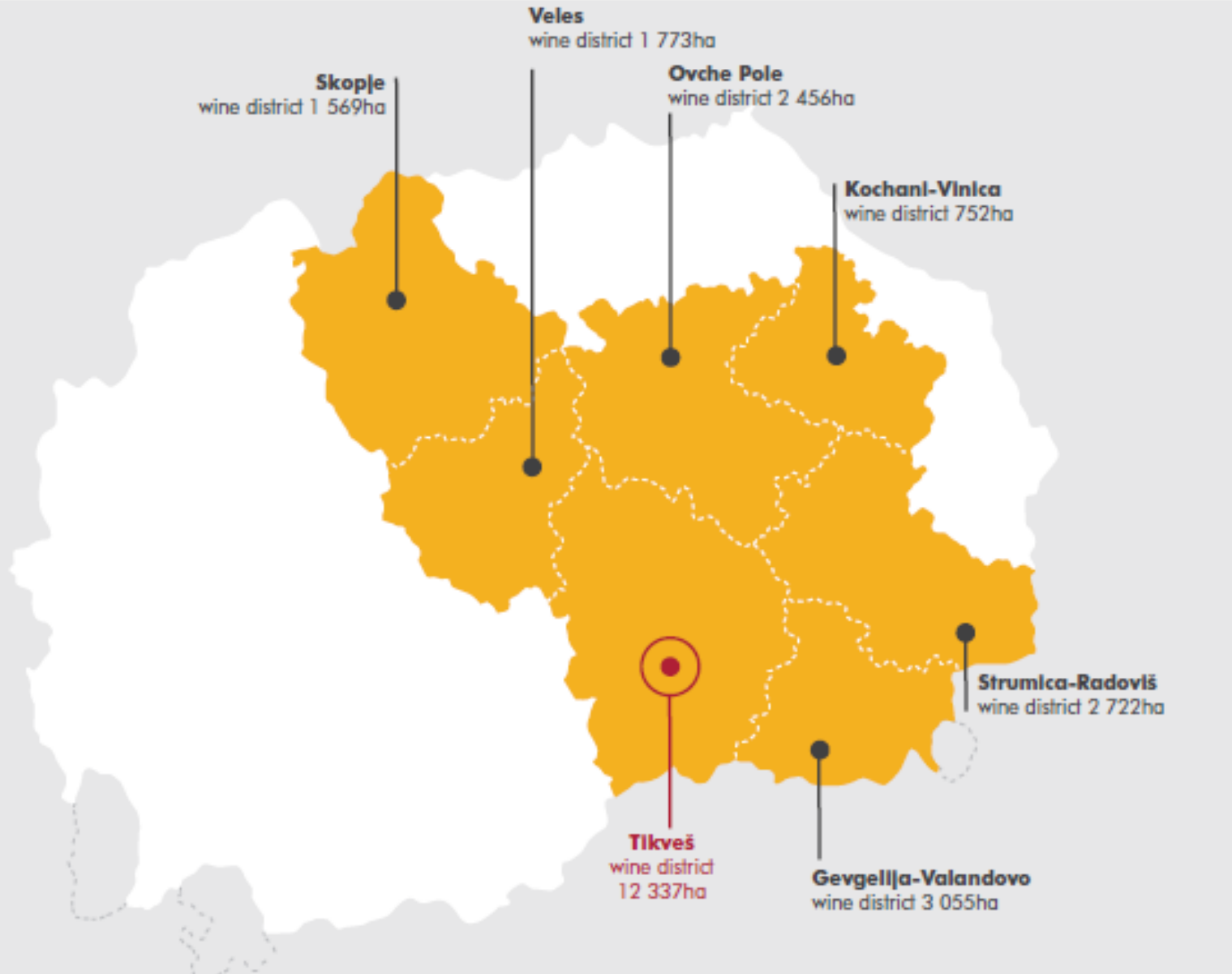
Wine Variety	type	Ha plated per variety
Vranec	red	10.800
Smederevka	white	7.500
Merlot	red	1.240
C. Sauvignon	red	1.140
Kratoshija	red	1.050
Rheine Riesling	white	990
Chardonnay	white	818
Pinot Noir	red	508
Rkatsiteli	white	482
Prokupec	red	480
Stanushina	red	423
Temjanika	white	381
Muscat Hamburg	white	381
Italian Riesling	white	305
Zupjanka	white	282
Plovdina	red	265
Zilavka	white	212
Sauvignon	white	209
Syrah	red	90
Terrane	white	82
Plavec Mali	red	50
Others	red/w hite	525

WINE REGIONS



87% of the total vineyard area in the country

Vardar River Valley
wine region



WINERIES



Wineries profile:

- 78 registered wineries
- 44 individual wine producers (limited with production below 50.000 L)
- Total capacity for production: 2 million HL



Diversified structure of wineries:

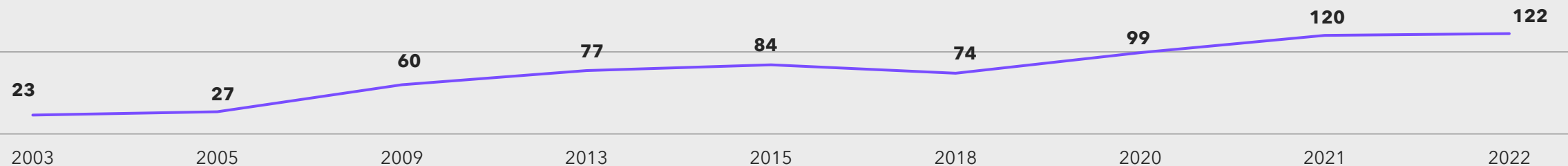
- 5 wineries with capacity between 15 mill to 30 mill L
- 6 wineries with capacity between 5mill to 15 mill L
- 8 wineries with capacity between 1 mill to 5 mill L
- 19 wineries with capacity between 250 thousands to 1mill L
- 13 wineries with capacity between 50 thousands to 250 thousands L
- 71 wineries below 50 thousands L (including the individual wine producers)



Export oriented wineries:

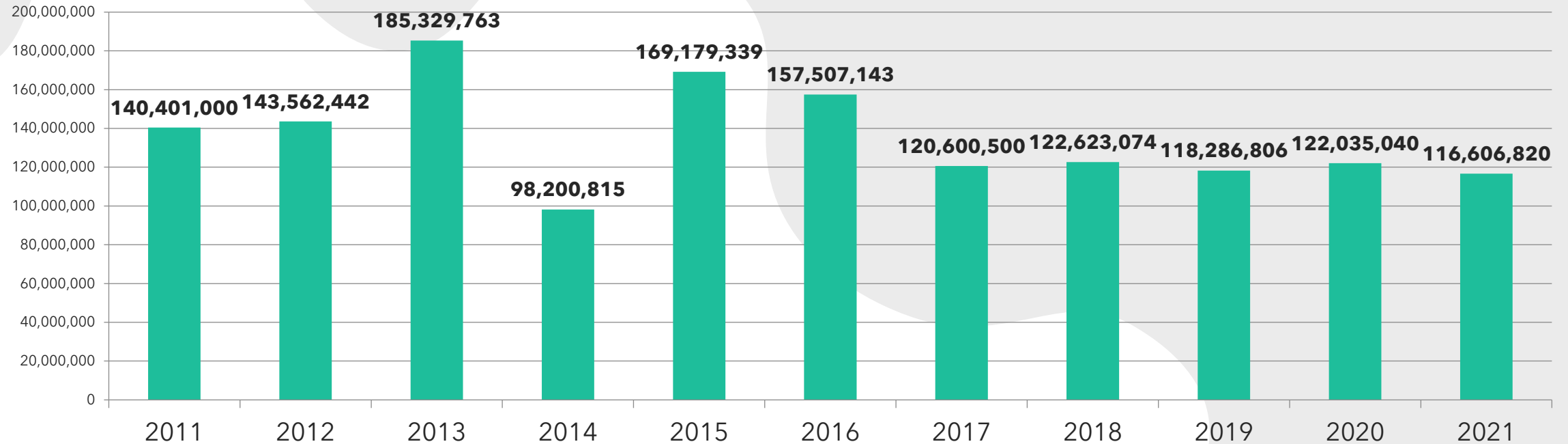
- Improvement in the quality of grape and wine production
- Significant investments in advanced technology

Number of registered wineries



HARVEST

Production of grapes in tones (wine + table grapes in kg)



HARVEST 2022 – Climatic characteristics

- 100 mill kg grapes
- Dynamic year
- Less fertile than 2021
- Flowering (May- June) - rainfall, low temperature
- Veraison /ripening (August) - several heat waves, high T, hail
- Ripening (September) - rainfall, Botrytis cinerea, Lobesia botrana
- 20 % less grape production

Quality of grape

Location of vineyard

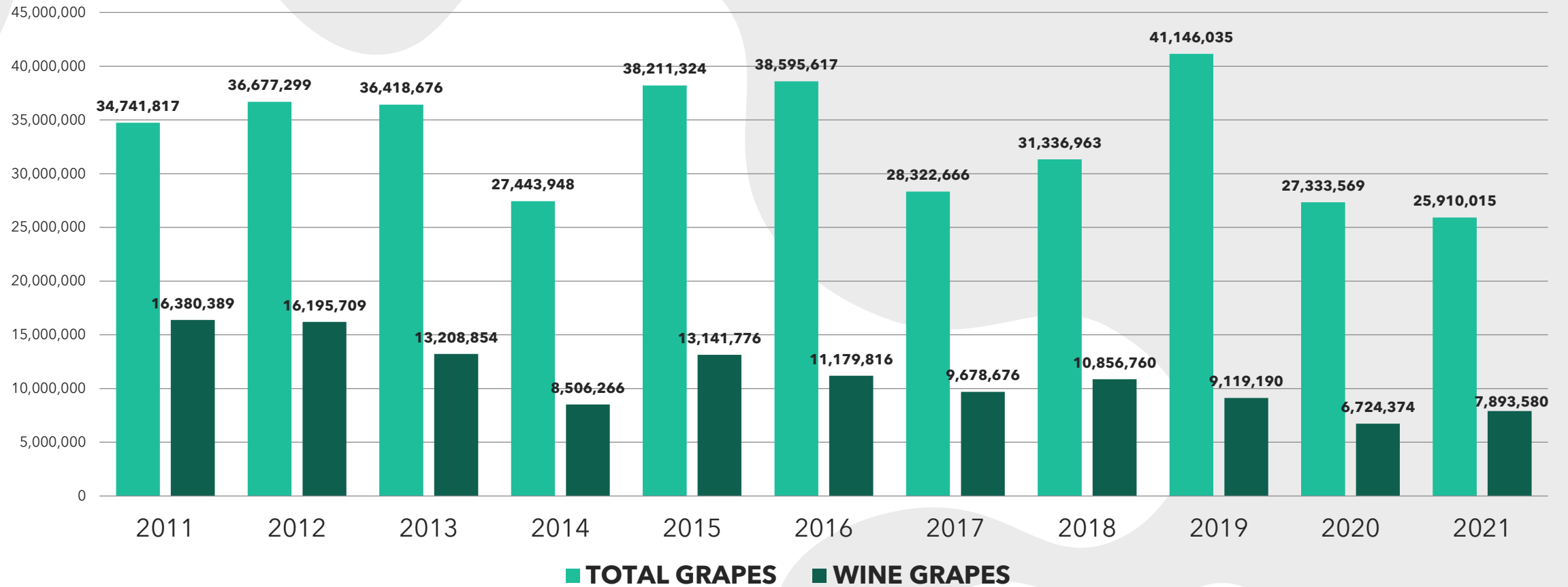
- Locations with higher altitude - high quality
- Locations with lower altitude + irrigation - low quality
- Varieties with early ripening period (Chardonnay, Temjanika)
- high quality
- prediction of the future quality of wine from the vintage 2022:

Generally, we expected the vintage with lower quality than 2021,
but depends of location and variety



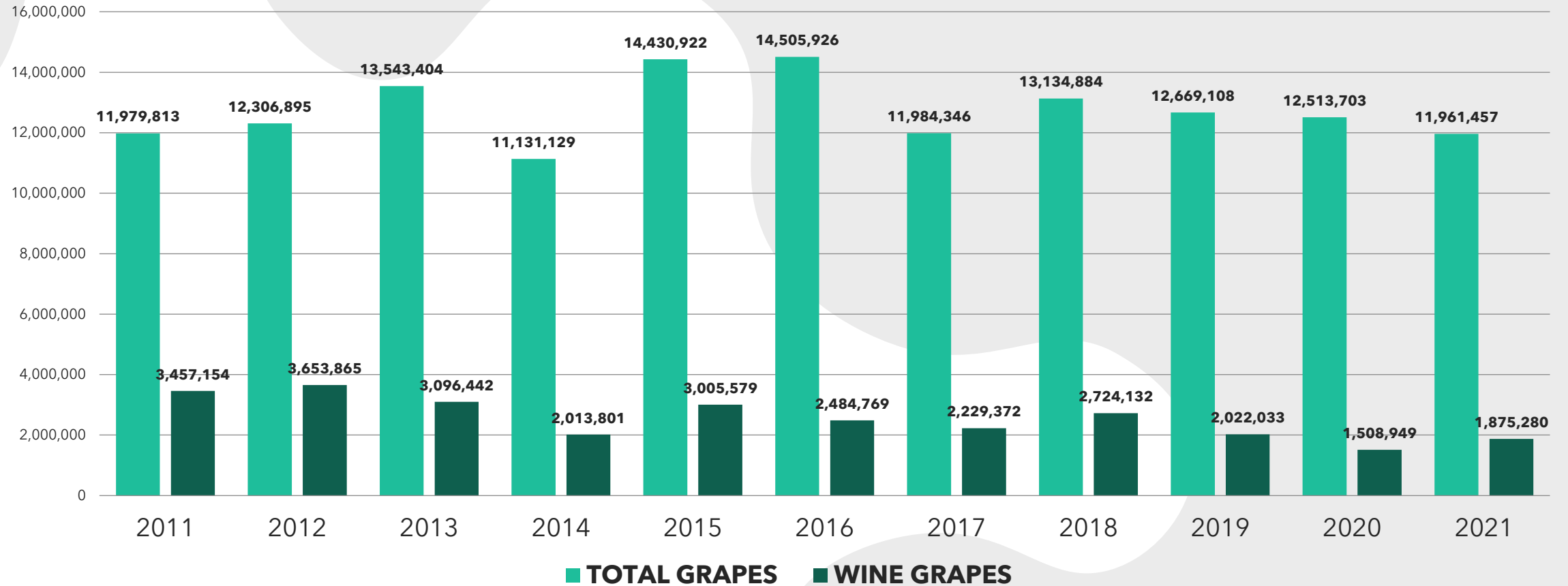
GRAPES EXPORT

Total grapes export per year
(by volume in kg)



GRAPES EXPORT

Total grapes export per year (by value in EUR)



Average export price for table grapes in 2021 = 0.56 eur/kg

Average export price for wine grapes in 2021 = 0.23 eur/kg

Country	Receiving institution	Head of institution	Who will sign the experimental growers contract	Who takes care about custom clearance	Who organizes the phytosanitary import declaration	Who selects and organises the proper preparation of the land
North Macedonia	Institute of Agriculture - Skopje University Ss. Cyril and Methodius in Skopje	Prof. Viktor Gjamovski Director	Director of IA		Phytosanitary inspection	IA on two different locations



THANK YOU FOR YOUR ATTENTION