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РАЗВИТИЕ ПОТЕНЦИАЛА ВИНОГРАДАРСТВА И ВИННОГО ТУРИЗМА В АТО ГАГАУЗИЯ

Алла Левитская

Постановка проблемы. Виноделие в АТО Гагаузия – стратегическая отрасль. Доля виноделия в общем объеме промышленного производства АТО Гагаузия составляет 60 процентов. Винодельческий потенциал представлен 16 винодельческими предприятиями. Однако не все они готовы принимать туристов и развивать винный туризм.

Постановка задачи, цели исследования. Целью исследования стало выявление наследия винного туризма в АТО Гагаузия, с основной задачей, заключающейся в разработке стратегий развития потенциала винного туризма и обеспечении устойчивого регионального развития.

Изложение основного материала (результаты работы). Виноградарство и винный туризм (эготуризм) в настоящее время являются перспективным и выгодным направлением для развития сельского туризма в сельской местности. Это включает в себя не только изучение технологий выращивания винограда, производства вина, но также изучение истории, культуры и традиций региона. Винный туризм, как часть сельского туризма, напрямую способствует развитию экономики региона. Что касается политики ЕС, развитие эготуризма играет важную роль в развитии услуг виноделов и росте занятости в сельской местности. Факторами, способствующими развитию винного туризма в АТО Гагаузия, являются: особая комбинация климатических и почвенных условий, создающая благоприятные условия для виноделия; высокая отраслевая концентрация производства и широкая ассортиментная линейка винодельческой продукции; наличие потенциала развития, связанного с виноградарством и винодельческим туризмом: сельского, экологического, гастрономического и этнографического.

Выводы в соответствии со статьей. Существуют три основные стратегические цели развития потенциала виноградарства и винного туризма в АТО Гагаузия: развитие туристических направлений Гагаузии на базе действующих винодельческих предприятий; формирование сети достопримечательностей (гостиничный и ресторанный бизнес, музеи, народные промыслы, концерты, театры) вокруг «зон привлекательности» – винодельческих предприятий; содействие возникновению и развитию сетевого взаимодействия основных игроков в сфере развития туризма.

Ключевые слова: виноградарство и винный туризм, региональное развитие, АТО Гагаузия.

РОЗВИТОК ПОТЕНЦІАЛУ ВІНОГРАДАРСТВА І ВИННОГО ТУРИЗМУ В АТО ГАГАУЗІЯ

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Постановка проблеми. Виноробство в АТО Гагаузія - стратегічна галузь. Частка виноробства в загальному обсязі промислового виробництва АТО Гагаузія становить 60 відсотків. Виноробний потенціал представлений 16 виноробними підприємствами. Однак не всі вони готові приймати туристів і розвивати винний туризм.

Постановка завдання, мети дослідження. Метою дослідження є виявлення спадщини винного туризму в АТО Гагаузія, з основним завданням, яке полягає в розробці стратегії розвитку потенціалу винного туризму і забезпеченні сталого регіонального розвитку.

Викладення основного матеріалу (результати роботи). Виноградарство і винний туризм (енотуризм) в даний час є перспективним і вигідним напрямком для розвитку сільського туризму в сільській місцевості. Це включає в себе не тільки вивчення технологій вирощування винограду, виробництва вина, але також вивчення історії, культури і традицій регіону. Винний туризм, як частина сільського туризму, безпосередньо сприяє розвитку економіки регіону. Що стосується політики ЄС, розвиток енотуризму відіграє важливу роль в розвитку послуг виноробів і зростання зайнятості в сільській місцевості. Факторами, що сприяють розвитку винного туризму в АТО Гагаузія, є: особлива комбінація кліматичних і ґрунтових умов, що створює сприятливі умови для виноробства; висока галузева концентрація виробництва і широка асортиментна лінійка виноробної продукції; наявність потенціалу розвитку, пов'язаного з виноградарством і виноробним туризмом: сільського, екологічного, гастрономічного та етнографічного.

Висновки відповідно до статті. Існують три основні стратегічні цілі розвитку потенціалу виноградарства і винного туризму в АТО Гагаузія: розвиток туристичних напрямків Гагаузії на базі діючих виноробних підприємств; формування мережі привабливості (готельний і ресторанний бізнес, музеї, народні промисли, концерти, театри) навколо «зон привабливості» - виноробних підприємств; сприяння формуванню та розвитку мережевої взаємодії основних гравців в сфері розвитку туризму.

Ключові слова: виноградарство і винний туризм, регіональний розвиток, АТО Гагаузія.

DEVELOPMENT OF THE POTENTIAL OF VITICULTURE AND WINE TOURISM IN ATU GAGAUZIA

Alla Levitskaia¹

Formulation of the problem. Winemaking in ATU Gagauzia is a strategic industry. The share of wine-making in the total industrial production of ATU Gagauzia is 60 per cent. The wine-making potential is represented by 16 wine-making enterprises. However, not all of them are ready to accept tourists and develop wine tourism.

Setting the task, the purpose of the study. The study aimed to identify the heritage of wine tourism in the ATU Gagauzia, with the main aim of elaborating development strategies for the wine tourism potential and ensuring a sustainable regional development.

Presentation of the main material (results of work). Viticulture and wine tourism (enotourism) is currently a promising and profitable direction for the development of rural tourism in rural areas. It includes not only learning the technology of growing grapes, wine production, but also learning the history, culture, and traditions of the region. The wine tourism, as part of rural tourism, directly contributes to the development of regional economic. In the EU policy, the development of enotourism plays an important role in the development of wine-makers services and employment growth in rural areas. Factors contributing to the development of wine tourism in ATU Gagauzia are: a special combination of climatic and soil conditions creates a favorable terroir for winemaking; high industry concentration of production and a wide assortment line of wine products; availability of development potential associated with viticulture and viniculture tourism: rural, environmental, gastronomic and ethnographic.

Conclusions according to the article. There are three main strategic goals of development of the potential of viticulture and wine tourism in ATU Gagauzia: development of tourist destinations of Gagauzia based on active wineries; formation of attractions (hotel and restaurant business, museums, folk crafts, concert organizations, and theater) around «zones of attraction» - wineries; promoting the emergence and development of network interaction of the main players of tourism development.

Key words: Viticulture and wine tourism, regional development, ATU Gagauzia.

JEL Classification: Z32; Q56

Overview of the Moldovan wine-making sector

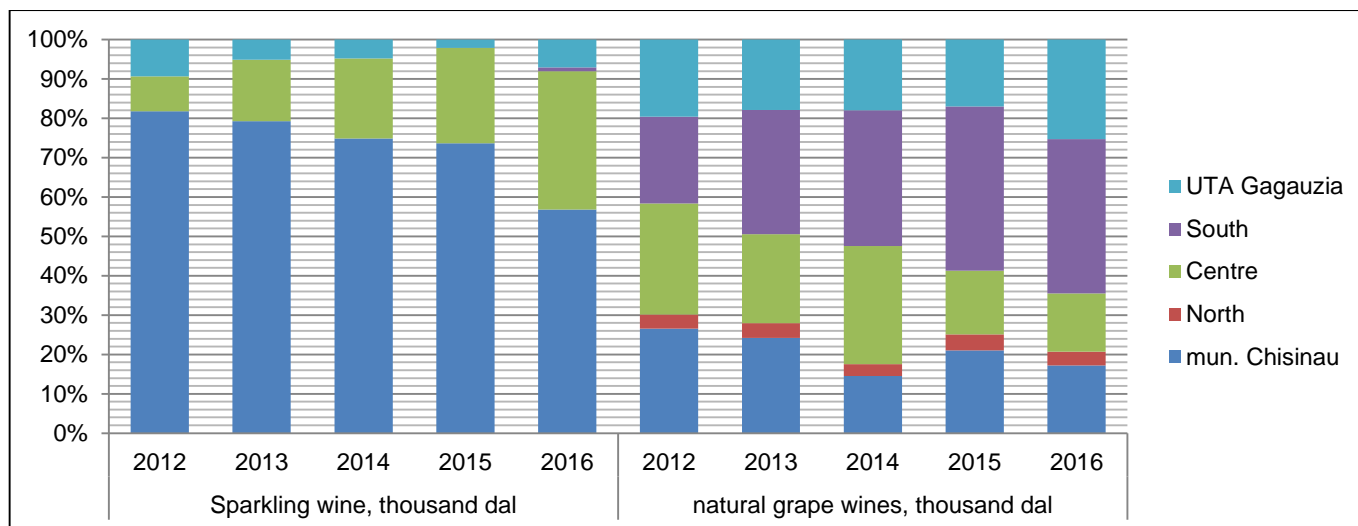
Dynamics of wine production

The Republic of Moldova has the highest planted vineyards density in the world and ranked 19th among the countries that produce wine. The area of vineyards for wine grapes is 78,000 hectares (3rd place in the Black Sea basin). In total, there are 52,000 winemakers (farmers), 980 enterprises operating in the VWT sector, including nurseries, wineries, agricultural enterprises and cooperatives, engineering companies, packaging and service enterprises, 6 educational institutions, technology transfer, and research centers.

This industry generates about 150,000 jobs, i.e. every 4th able-bodied citizen is directly or indirectly involved in winemaking. For the last 15 years, about 600 million US dollars have been invested in the development of 30 thousand hectares of vineyards. 24 wineries and 5 specialized agencies in wine tourism are actively involved in viniculture tourism. Compared to 2016, there was an increase in the number of tourists visiting wineries by 31 per cent (175 thousand people), of which local residents are 64 per cent, foreigners – 36 per cent, whose stay in the country is 3.2 people/day and the amount of expenses is of 28.5 EUR/day. Thus, VWT generates about 7 million euros per year [1]. The industry forms 3 per cent of Moldova's GDP and makes up about 12 per cent of exports.

The vineyards of the Republic of Moldova are on the same latitude as the famous winemaking regions of

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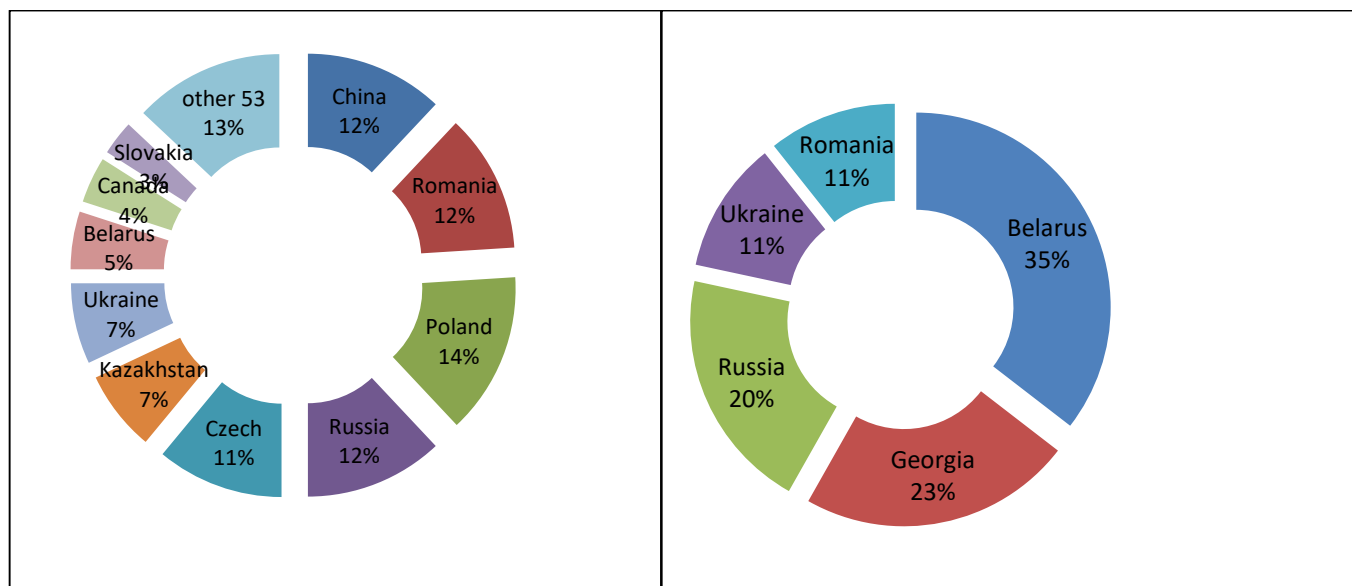


Graph 3. Production of natural wines by development regions, thousand dal

Source: National Bureau of Wine and Grapes (NBWG)

In 2017, the volume of wine production amounted to 18 million dals, and the export volume exceeded 128 million US dollars. The diversification of markets for Moldovan wines is growing along with their popularity. According to the National Bureau of Wine and Grapes, the volume of bottled wine was 54,208,396 bottles. Figure 4 shows the TOP 10 export directions for bottled wine and bulk wine.

There are 95 cultivated varieties of grape in the Republic of Moldova, of which the ratio of red and white is 55:45. International grape varieties are 85 per cent, varieties of the Black Sea basin are 10 per cent, autochthonous varieties and selection of new varieties are 5 per cent. Of the 35 wine grapes, the authenticity of the product is provided by local varieties (Feteasca Albe (24 per cent), Feteasca Regale (28 per cent), Feteasca Neagra (33 per cent), Rara Neagra (1.5 per cent), Viorica) of grapes growing at 10% from all areas [2]. There are also varieties that are little known to producers but are widely distributed among the rural people - Plavay, Negrou de Causeni, Kopchak, Roshioara [3].



Graph 4. TOP 10 export directions of bottled and bulk wine

Source: National Bureau of Wine and Grapes (NBWG)

Regions of the Republic of Moldova with a protected geographical indication – IGP

Moldova is divided into 4 regions with a protected geographical indication (IGP) (Fig. 1): Codru (45 per cent) covers 35,100 hectares, Valul lui Traian (39 per cent) - 30,420 hectares, Stefan Vodă (16 per cent) - 12,480 hectares. IGP is a kind of quality mark, which came to Moldova from Italy to protect products whose origin is directly related to the territory of origin. To obtain IGP, it is sufficient that at least one of the stages of raw material processing be associated with a specific locality [4]. Since May 7, 2017, wines are classified as follows: wines with a protected place of origin (DOP), then a lower level - wines with a protected geographical indication (IGP), then wines with the name of a grape variety.

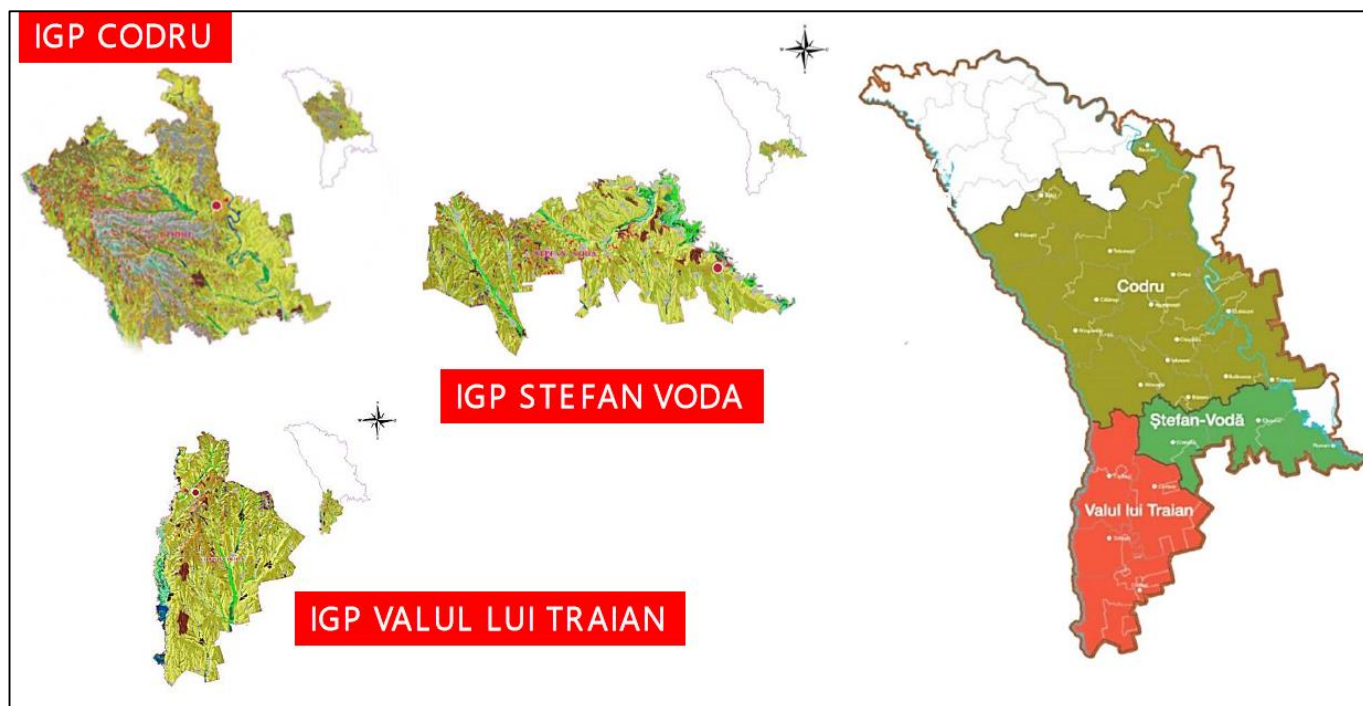


Figure 1. Viticulture and viniculture zones of the Republic of Moldova specialized on production of wines with a protected geographical indication

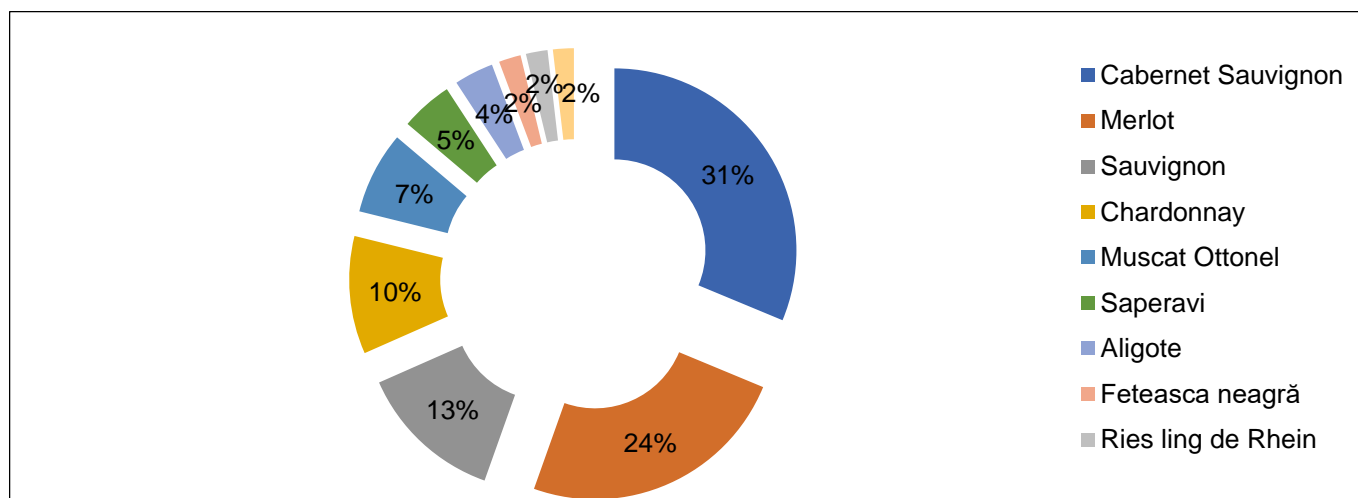
Source: National Bureau of Wine and Grapes (NBWG)

Wine plantations are divided into four regions with a protected geographical indication, registered by the European Union: the region «Codru» (the center of the country is white wines), «Ștefan Vodă» (southeast, red varietal and blending wines), «Valul lui Traian» (south-west, liqueur and red wines), «Divin» (the entire geographical territory is brandy, aged in oak casks).

The region with a protected geographical indication «Valul lui Traian»

The vineyard and winemaking zone for the production of wines with the geographically protected name «Valul lui Traian» includes Leova, Cantemir, Cahul, Taraclia, Comrat, Ceadir-Lunga, and Vulcanesti districts. The region is named after the ancient historical monument – Trajan's Wall, built in the period of late antiquity. The first mention appears in 1489. The geographically delimited area «Valul lui Traian» consists of three subzones:

- Tigic hill - fragmented terrain with a maximum height of 300m. The composition of the soil is alloyed chernozem and gray soil;
- Prut terraces - terraces with a maximum height of 220m. The soil composition is ash and leached chernozem;
- Bugeac steppe - a combination of valleys and ravines, low-flow rivers. The soil composition is black soil with moderate humus content, carbonate black soil and saline soils.
- The top 10 grape varieties of the Valul lui Traian zone with IGP are presented in Figure 15 of which: white and pink varieties are 39 per cent, and red is 61 per cent.



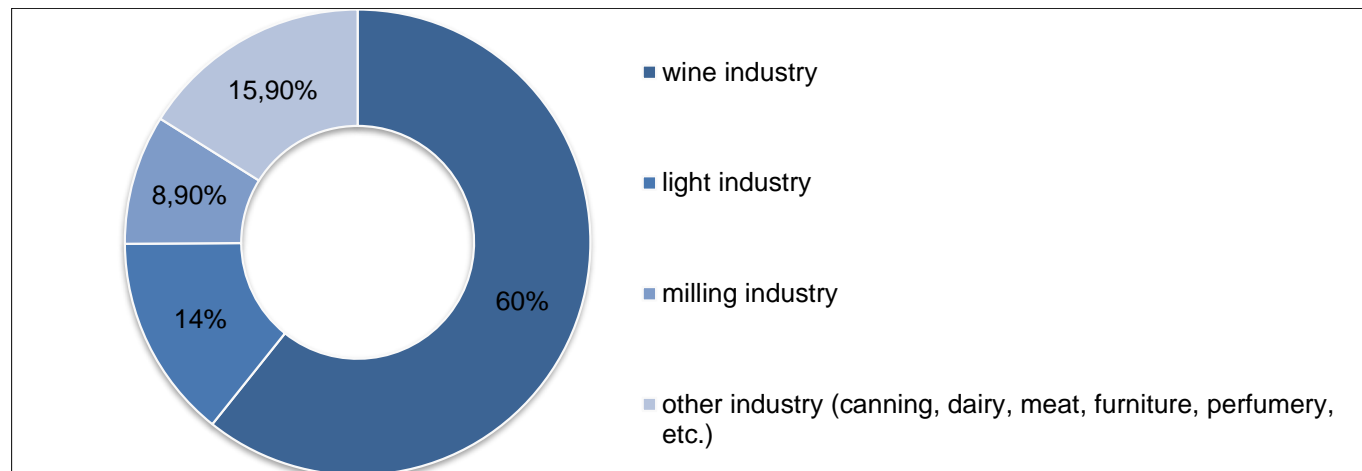
Graph 5. Popular grape varieties

Source: National Bureau of Wine and Grapes (NBWG)

The color of red wines is more intense than in other areas: from pomegranate to cherry; rich taste, thanks to high extract content. White wines are exquisite and lively, with an elegant bouquet and fresh fruity notes. Liquor wines have a rich taste, which with intensive ripening is complemented by hints of caramel, chocolate, and sweet spices. The color of liqueur wines becomes amber (in white wines) and ruby-pomegranate (in red wines) [2].

Wine-making sector of ATU Gagauzia

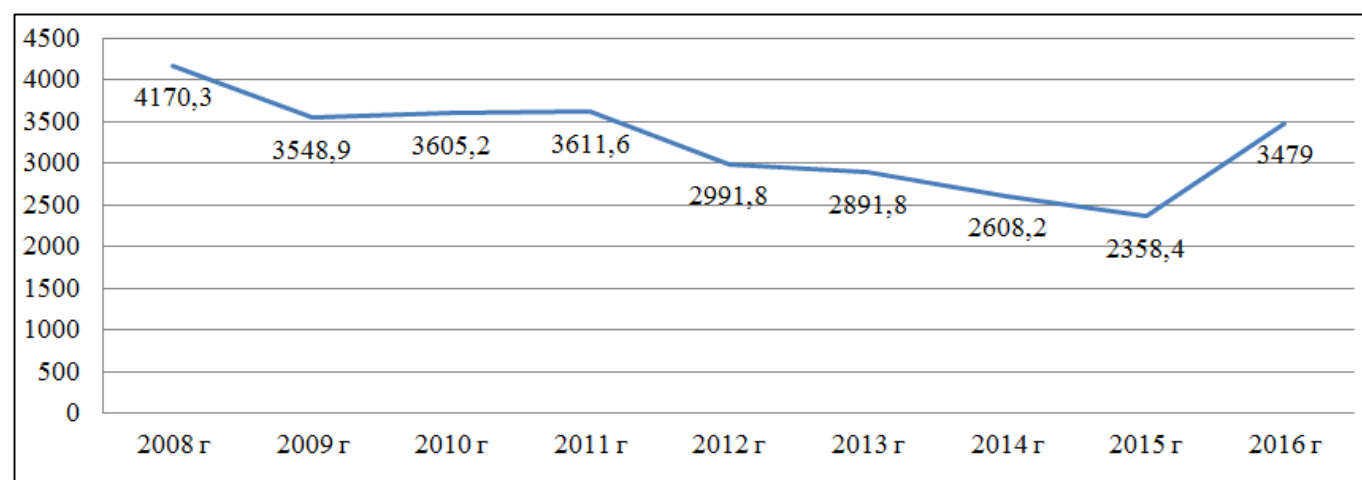
Winemaking in ATU Gagauzia is a strategic industry. The share of wine-making in the total industrial production of ATU Gagauzia is 60 per cent. Such a concentration of this type of production is not observed in other developing regions of the Republic of Moldova.



Graph 6. Structure of industrial products in the ATU Gagauzia on 01.01.2016

Source: [5]

The dynamics of the production of wine in the ATU Gagauzia illustrates a slight decline until 2015 and then we can see an upturn in 2016.



Graph 7. Dynamics of production of wine products in the ATU Gagauzia

Source: General Directorate of Economic Development of ATU Gagauzia

The wine-making potential is represented by 16 wine-making enterprises, 14 of which are members of the GAGAUZYA-VIN Winemakers Association. 9 companies have tasting rooms. However, not all of them are ready to accept tourists and develop wine tourism. Two large enterprises: Vinaria Bostovan DK-INTERTRADE SRL have the largest market share in total sales income (45 per cent).

Wineries of autonomy produce ordinary wines, dessert wines, sparkling wines, as well as strong alcoholic beverages. The production of wine and wine materials is about 3.5 million dals. In 2007–2015, the share of the ATU Gagauzia in the total volume of wine production in the Republic of Moldova was between 19 per cent and 24 per cent. Products are exported to many countries: Russian Federation, Poland, Ukraine, Georgia, Latvia, Slovakia, Romania, Belarus, Czech Republic, Kazakhstan, China and other countries of the near and far abroad.

Potential development of wine tourism in the ATU Gagauzia

Viticulture and viniculture tourism (VWT) is a motivational form of tourism, in order to visit wine-making enterprises and wine-making areas to combine the pleasure of tasting wine products with the opportunity to become familiar with local customs, rural lifestyle and cultural events.

The program «Wine Road in Moldova» [6] approved in 2004, marked the beginning of the promotion of the country's image on the basis of wine and viticulture (VWT) tourism. This type of tourism is recognized as «anchor» for the development of inbound and domestic tourism. This was facilitated by a comprehensive program to promote Moldova as a wine-tourist destination, including an online campaign, participation in specialized fairs and exhibitions, the organization of thematic events and study visits, etc.[7]

The participation of Moldova in the EU project to promote the Black Sea Wine Tourism Network has given a serious impetus to the development of winemaking [8]. The trend of increasing interest in Moldova is noticeable in the growth of the number of organized tourist groups arriving to get acquainted with local wines, cuisine, and national traditions.

The largest increase in the number of foreign tourist arrivals within the VWT is observed in the fall when the Wine Festival is held (in Chisinau and Comrat), as well as at the end of winter when the ExpoVin Moldova exhibition is held. The rest of the time is a reserve for organizing events that can be visited by domestic tourists and guests from near abroad.

Of course, the wine-making enterprises of the ATU Gagauzia cannot compete with the large enterprises with well-known vineries of the international level: Cricova, Purcari, Milestii, and Mici. Recently they are gaining popularity by the representatives of micro vine-making: Novac, Kara Gani. A small number of tourist sites of Gagauzia are included in the tourist turnover of Moldova. Of the 20 official tourist routes approved by the Tourism Authority, only one route of «Through Gagauzia and Bugeac» passes through the territory of the ATU Gagauzia.

Of these, 14 members of the Association of Winemakers «Gagauzya-Vin,» currently only 3 enterprises have restored tasting rooms and are interested in accepting tourists. It is these companies that can be included in the tourist wine routes of the ATU Gagauzia.

Ecological potential plays a special role - vineyards planted on hillsides stop erosion and contribute to landscape conservation. The European Convention on Landscape Management and Planning has conducted a series of studies emphasizing the value of vineyards in environmental protection and positioning landscapes with vineyards as indicative of the promotion of ecotourism.

Factors contributing to the development of wine tourism in ATU Gagauzia:

- A special combination of climatic and soil conditions creates a favorable terroir for winemaking (for example, water deficiency favorably affects red grape varieties, long autumn contributes accumulating sugar in berries);
- High industry concentration of production and a wide assortment line of wine products (about 24 per cent of the total state production), as well as wide geography of exports, ensuring Gagauz wine recognition (about 90 per cent of wine products are exported to over 50 countries).
- Availability of development potential associated with viticulture and viniculture tourism: rural, environmental, gastronomic and ethnographic.

Conclusions:

1. Development of tourist destinations of Gagauzia based on active wineries

This strategic goal involves the promotion of initiatives of active players of gastronomic tourism: wineries, micro and home wineries interested in the development of wine tourism in order to form a tourist VWT destination of «Gagauzia» [9].

Within the framework of the first direction, actions are planned aimed at the development of the VWT infrastructure and the promotion of local wines and brands. It is intended to improve the legislative and institutional framework for the activities of VWT entities in the direction of simplifying registration and licensing of small and medium-sized businesses in the field of tourism. This requires the active participation of all stakeholders: national, local and regional authorities, organizations promoting wine tourism, associations of support for small and medium-sized businesses in the region, educational and research structures.

2. Formation of attractions of tourist destinations

This strategic goal involves the development of natural and the creation of artificial attractions around «zones of attraction» - wineries based on the development of competencies of companies from related tourism to vine-making (hotel and restaurant business, museums, folk crafts, concert organizations, and theater).

Gagauz KORAF LARI – Gagauz Ornaments, Gagauz SOFRASI – Gagauz Hospitality/Kitchen, Gagauz ŞARAPÇI – Gagauz Wine, Gagauz MIRASI – Gagauz HERITAGE, Bugeac KILIM – Buceak CARPET

The implementation of the activities of the second direction will increase the competence of small and medium-sized businesses in the field of tourism and the promotion of their interests at the national and regional levels.

The development of the competencies of companies from the wine-related types of tourism will make it possible to increase the competitiveness of tourism products as a whole and more successfully coordinate the joint actions of the tourism business players. The introduction of training programs based on the implementation of international quality standards in the service sector will increase the export potential in the field of tourism and lead to an increase in the region's GRP.

It is intended to introduce a number of projects aimed at modernizing cultural institutions, preserving and promoting traditions, history, and art crafts as an integral part of the strategic development plan for VWT. Registration of intellectual property objects including local wines and products (kavarma, kaurma, baur, myrda, gozlema, etc.) These activities will increase the marketing attraction of a tourist destination.

3. Promoting the emergence and development of network interaction of the main players of tourism development

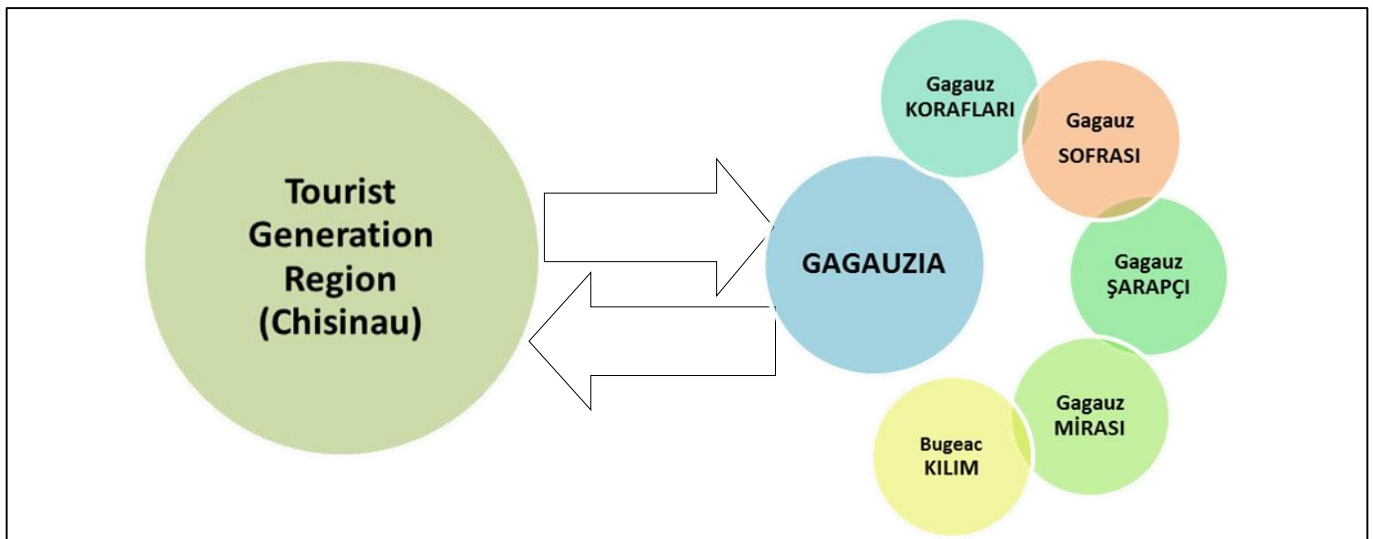


Figure 2. Formation of interregional destinations of Gagauzia

The actions included in the third direction imply the creation of a coordinating tourism activity of the Destination Management Organization, whose activity will focus on mobilizing the population within the framework of eight MIGs allocated for the LEADER program and the development of cluster initiatives of participants in the tourist field of activity. This network with the core of the Regional Tour-Info (RTI) will help create conditions for the formation of tourist attractions and promote the image of ATU Gagauzia as a region with developed VWT at the national and international levels.

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