# THE POTENTIAL OF ROMANIAN WINERIES IN WINE TOURISM DEVELOPMENT

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#### Abstract

Wine tourism in Romania is relatively a new concept that became a topic of interestin the last years. If countries such as France, Italy, Spain or Australia are already well known not only for their wine quality, but also for diverse wine tourism activities that are taking place in their most known wine regions, Romania is stillin progress with wine tourism development. The aim of this paper is to highlight the wine-growing and wine-making potential of Romania and the way it could leadto the growth of the wine tourism. From the quantitative analysis that was made in order to see where the country stands in terms of wine production, exports, imports and consumption compared with the main wine producing countries, it has been seen that Romania has a positive evolution trendandoverall, it ranks 13<sup>th</sup> worldwide in regard to wine production. Additionally, the second part of the analysis has shown the classification of Romanian wine regionsand the number of wineries per region, as well as the main wineries that offer wine tourism services. Considering the dimension of the wine sector, there is an orientation of Romanian wineries towards the growth of the wine tourism services, where currently Muntenia and Oltenia wine regions stand out.

Key words: tourism, wine sector, wine route, touristic offer, viticulture

#### INTRODUCTION

Wine tourism has become a very attractive type of tourism in many countries, and it can be confirmed by the fact that more and more research papers are being published with case studies from different wine destinations of the world. Eno-tourism is a niche type of tourism that became popular even in Romania in the last couple of years. This type of tourism is playing a significant role in both wine and tourism sectors. As per definition, the main activity related to wine tourism is the wine tasting, that takes place at the wine cellar. However, one of the most known wine tourism definitions is given by [12] that states "wine tourism is a visitation to the vineyards, wineries, wine festivals and wine shows for grape wine tasting and/ or experiencing the attributes of a grape wine region are the prime motivating factors fir visitors".

In recent years besides wine tasting, wineries owners have tried to expand their services and introduced to the list of activities at the cellar various experiences that might attract visitors. Also, the focus of the wineries owners nowadays is to improve the tourism package for the visitors and to have facilities as accommodation, catering, entertainment etc. The wine region charm is also an important motivating factor for visitors as they always have the possibility to taste wines in the proximity of their homes (restaurants. festivals or to purchase wine from the store). [24] relates the factors that enhance the wine destinations performance, but also these could be consider as potential factors for wine tourism development as follows: management of wine related resources, the support of tourism services, amenities and facilities. infrastructure, networking, destination image, brand identity, external factors and management of demand issues. In order to sustain these ideas, various papers were approaching the subject of wine destinations development based on case studies of wine regions from the main wine production countries.

According to [28], the focus on the development of oeno-tourism occurs from economic interests – in the last years wine production increased and this generated high profit for the winemakers and stakeholders,

therefore they started to target additional businesses that might result in greater revenue. Starting from this assumption, wine producers made progress in making plans to expand services at the wine cellar, as well as to invest in dedicated shops to sell more wine. In the perception of [3] in order to have a sustainable wine tourism development and to improve the awareness of the wine area, it is mandatory that marketing alliances established. In Romania there is only one wine region that has an alliance at this moment with the purpose to promote the area and to align to the same quality standards when it comes to wine production. Asociația Dealu Mare [1] is formed at the moment from 15 wineries with history in the area, however in the region it is a high concentration of wine cellars also known as one of the most important wine route in Romania.

The wine routes are signaled pathways that make the connection between wineries from a certain region as [16] presented in their paper. Furthermore, wine routes represent an economic advantage for the wine region as it gives the opportunity to the wine makers to organize thematic trips to the winery and to enggage with consumers [5].

In addition, wine routes might be the key enabler for the development of a wine region if it receives the support of public and private organizations [9] as it represents an opportunity to bring in the attention of the people elements as cultural landscape, reputation of terroir [26], social and environmental experiences [11].

The travel experience for the wine tourism began when the wine routes were seen as tourist products. Considering this, a new area started with the scope to revive the wine region and to protect it while wine producers present to the world the wine heritage that they own [13]. The wine routes started to be recognized as touristic attractions once the wine producers invested in the developemnt of the infrastructure from the area together with other interested parties( hotels, restaurants etc.) [10]. The interest in wine routes started around 1920s in the area of Rhine Valley where people could admire the wonderful view over the vineyard, and further South Africa, California, Australia etc. [25]. On the other hand, in terms of what attracts people to a wine region [2] identifies that tourists may decide to visit a specific wine route based on a mix of environmental, cultural and social features as an integrated part of wine tourism industry development. To have a better perspective on interdependence between wine tourism and wine sector, [23] define that experience is the key element that attracts people to the wine region. Wine tourism system as the author stated is split between demand and supply of the wine, meaning that wine producers should be able to create an experience to the visitors while they come in contact with the wine

related products or activities such as festivals, winescapes, wine tastings etc. Also, other

authors such as [4] described in their paper

which are the wine experiences that have the

biggest impact on customers experience, for

instance wine education, tastings, wine

activities, services, food pairing, cultural heritage or festivals and events that focus on

wine discovery.

more wine routes were established in France,

Additionally, [5] stated that wine producers have the opportunity to add up to their wine business new segments of activity where they offer additional goods and services with the scope to enhance the experiential value of the customers. Therefore, wine tourism contributes to the expansion of the farms and the agriculture sector from the wine regions as a primary driver.

In the light of analysing Romanian wineries with the purpose of wine tourism development, firstly the paper aims to investigate the country wine attributes compared with the main wine producing countries. Secondly, the objective is to review Romania's wine regions in order to show the high potential for expansion.

In order to reach the goals of this research, the data for the analysis was sourced from the database of OIV (International Organisation of Vine and Wine), together with relevant details extracted from various databases available on wine related websites [15, 21, 29, 30] and from the National Institute of Statistics [14].

#### **MATERIALS AND METHODS**

In order to write this paper, the comparative method was used for the first part of the analysis and it is quantitative in nature. By comparing Romania in terms of wine production, exports, imports, vineyard surface with the main wine production countries it allowed to establish whether the country has enough potential to develop wine tourism or not.

The data was analysed with Data Analysis using indicators as: minimum, maximum, average and Descriptive Statistic tools from Microsoft Excel. Moreover, the analysed countries are also the ones with the most developed wine tourism [17].

For the second part of the research, the database has been completed with evidence acquired from various wine related websites where the classical research methodology was used.

The analysis was mostly qualitative as details and information regarding the attributes of the wine regions were extracted.

#### **RESULTS AND DISCUSSIONS**

In terms of wine territory, according to OIV (the International Organization of Vine and Wine) Report in 2022 [15], Romania has 188,428 ha of vineyard which is around 3.1% of the total world vineyards surface area.

From the point of view of wine production, Romania produces approximately 3.1% of the wine of the world based on the available data for the year of 2022 on OIV database.

Also, Romania has a vast history in grape cultivation and wine production with viticulture dating back more than 6000 years ago; this is the one of the reasons why Romania occupies at the moment the 13th place on the top of wine-producing countries as per World Population Review (2023) [31]. In the following figures, it can be observed the evolution of wine consumption, exports, imports and production for the top ten wine producing countries and Romania in the last ten years.

The development of international trade is one of the factors that had a direct influence on the

wine industry. The wine consumption increased during 1990s in Europe and America [18] and this led to growth of wine exports.

In this analysis, the maxim value of consumption was 144.5 mhl (1 mhl = 100,000,000 liters) in 2017, where the United States of Americawas leading with 32.7 mhl. France and Italywere next in top with 28.3 mhl and 22.4 mhl, while Romania had a consumption of only 4.1 mhl being on the second last place.

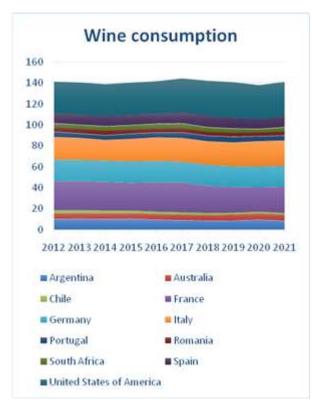


Fig.1. The countries with the highest wine consumption (Million hl /year)

Source: OIV processed information [15].

However, Romania reached the maxim value (4.7 mhl) of wine consumption in 2014, where the minimum was 3.8 mhl in 2016. An important fact to notice is that in the year of 2020when COVID-19 pandemics started the wine consumption was the lowest being only 138.1 mhl.

As a general comment over the years that were analysed the wine consumption was mostly constant with no high deviations.

The wine exports (Fig. 2) leader is Spain with 240.9 mhl in total for the years of analysis, followed by Italy with 229.6 mhl and France

with 157.8 mhl. The delta of exports volume between the three countries isquite significant and it is not directly proportional with the wine production.

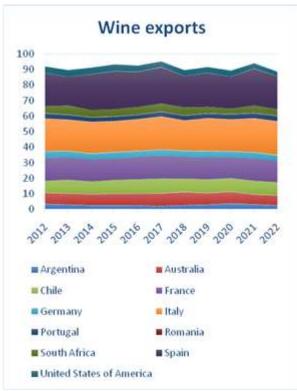


Fig. 2. The top wined exporting countries in the world, Wine exports (Million hl/year)

Source: OIV processed information [15].

Romania's exports are very low, only 1.8 mhl in total between 2012 - 2022 being the last one from the evaluated countries [6, 7].

Also, the delta between Romania and the second to last ranked country (Argentina) is 30.9 mhl which issubstantial considering the other countries results. Romania's exports started growing slowly since 2017, while the overall trend was a small decrease in 2018, 2020 and 2022 compared with the other years where the exports were above 90.0 mhl.

In addition, the imports (Fig. 3) were constant with values between 39 – 43 mhl, where the highest volume was in 2021. The biggest importer is Germany with a total of 163.8 mhl over the chosen period, followed by the United States of America – 132.2 mhl. On the other hand, Argentina, Chile, South Africa and Australia have a low rate of wine imports. In case of Romania, the volum of imports is 5.1 mhl that places it in the middle.

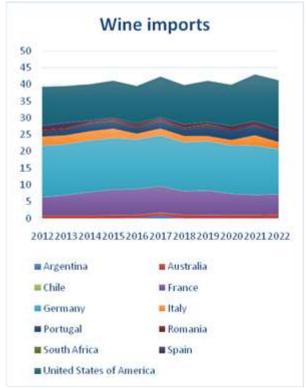


Fig. 3. The top countries with the highest wine Wine imports (Million hl/year)

Source: OIV processed information [15].

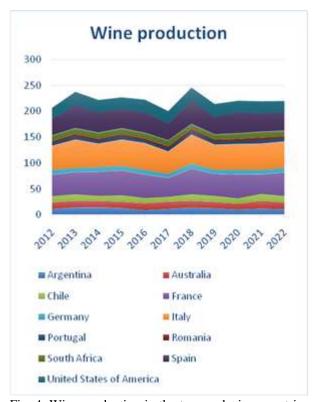


Fig. 4. Wine production in the top producing countries (Million hl)

Source: OIV processed information [15].

However, it is important to notice that Romania imports 2.8% more wines than it

exports having the same trend as the United States of America and Germany versus the rest of the countries where the volume of exports are significantly higher than imported wines, while Portugal it is almost balanced.

For the wine production (Fig. 4) year of 2018 was the most productive with a total of 246.1 mhl across countries, while the year before it reached the minimum -200.4 mhl.

Italy (538.75 mhl) was the leader in terms of wine production during these years followed by France (481.25 mhl) and Spain (416.81 mhl).

The wine production of Romania during 2012 – 2022 was 44.95 mhl, that results in only 4% exports from the total production which ranks it last compared with rest of analysed countries.

In contrast, Chile has the biggest rate of exports with 73% of the total wine produced, while Australia and Spain export as well more than 50% from their total wine production.

Table 1. Descriptive statistics for wine production between 2012 - 2022

Country	Mean	S.D.
Argentina	12.62	1.81
Australia	12.57	1.04
Chile	11.71	1.44
France	43.75	4.08
Germany	8.75	0.70
Italy	48.98	3.80
Portugal	6.52	0.42
Romania	4.09	0.66
South Africa	10.58	0.59
Spain	37.89	4.74
USA	24.15	1.32
Carrage OIV and a	agad information [15]	

Source: OIV processed information [15].

In Table 1, it is shown the mean of the total wine production for the chosen period, considering the standard deviation most of the countries produced a constant quantity of wine, while the biggest producers such as Spain, France and Italy had sharp deviations in terms of wine production throughout the time.

Furthermore, regarding vineyard surface (Fig. 5) over the years a drop for most of the nations can be observed. Due to the fact that Spain, France and Italy have the largest vineyard surface, thus these countries have also the biggest production in terms of

volume. In this perspective, Romania's vineyard surface has slowly decreased starting with 2012.

Moreover, it is important to notice that Romania has greater vineyard surface than Australia and Germany.However, these 2 countries havea higher wine productioncompared with Romania.

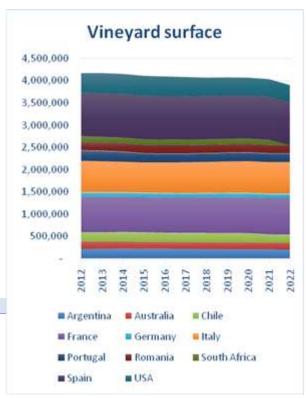


Fig. 5. Vineyard surface in various countries (ha) Source: OIV processed information [15].

On the other side, wine producing countries are divided into two worlds: Old World (e.g. France, Italy, Spain, Portugal, Germany, Romania etc.) and New World (e.g. the United States, Australia, South Africa, Argentina etc.) [27]. Hence, as a result of the above split we can notice that the top performing wine producing countries are a mix between Old and New worlds.

In connection to the above analysis where Romania was compared with the primary wine producing countries, we will continue the second part of the analysis with the description and attributes of the main wine regions of the country.

The main wine regions of Romania are Transylvania, Banat, Dobrogea, Moldova Hills, Maramures, Crisana, Muntenia and Oltenia. The wine-growing areas of Romania are also divided in sub-regions as can be seen in Figure 6, with different climatic conditions

allowing to the producers to cutivate various types of grapes (Table 2), thus resulting in a very diverse wine offer [29].

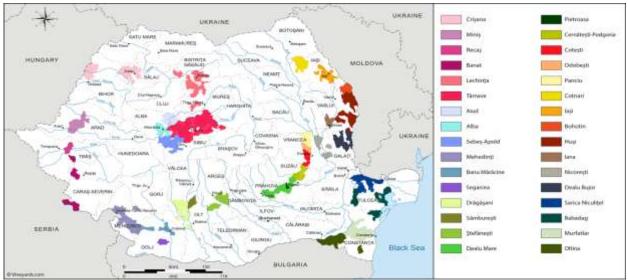


Fig. 6. The wine map of Romania

Source: https://vineyards.com/wine-map/romania [32].

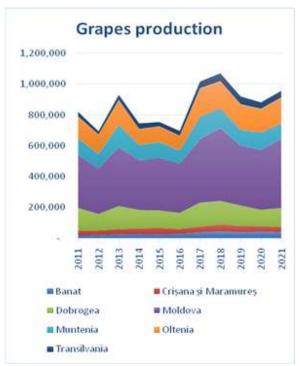


Fig. 7. Grapes production in Romania (tonnes) Source: INSSE processed information [14].

In the Figures 7 and 8, we may examine Romania's potential in terms of wine production. Moldova region has the largest share of the cultivated vineyard area, holding 41% of the total in the country, while in terms of grape production this wine region sums up 44% from the total.

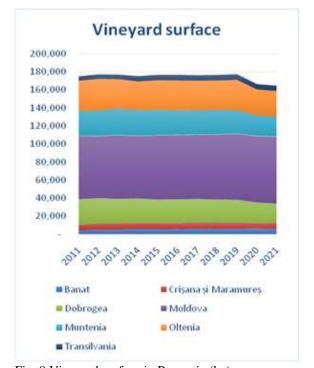


Fig. 8 Vineyard surface in Romania (ha) Source: INSSE processed information [14].

Furthermore, as can be seen in Table 3, Moldova is the wine region with the most wineries (around 118 locations), and also in the region there are two research and development stations for vinification and viticulture.

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The evolution of the grapes production for the chosen period was mostly constant, except during 2017 – 2019, where after a significant increase in 2017 and 2018, in 2019 there was a sharp drop, while the vineyard surface did not have considerable changes.

Oltenia holds 19% of the total vineyard surface with no considerable deviations for the analysed period, while Muntenia with 15% of the total vineyard surface has a harsh drop of cultivated area in 2020.

Regarding grapes production, Oltenia has substantial variations during the years with multiple declines.

While in 2016 reaches the minimum production from the analysed years, in 2017, it recovers fast and reaches the maximum grape production.

Table 2. Wine regions distribution in Romania

				Wine regions			
	Wine region of Banat	Wine region Colinele Dobrogei	Wine region Crișanei and Maramureșului	Wine region Deahirile Moldovei	Wine region Dealurile Musteries and Oltenies	Wine region of Podaşului Transilvaniei	Wine region Terasele Dunăria and alte terenuri
Wine regions with Designation of Origin (DOC)	DOC Banat, Doc Recaș	DOC Murfatlar, DOC Babadag, DOC Adamelisi, DOC Sarica Niculițel	DOC Crişana, PDO Miniş	DOC Behotin, DOC Cotnari, DOC Dragdşanii, DOC Huşi, DOC Inni, DOC Inşi, DOC Nicoreşti, DOC Pancin, DOC Coteşti, DOC Dealu Bujorulus, DOC Odobeşti	DOC Dealu Mare, DOC Stefânști, DOC Pietrossa, Sâmburești, DOC Bann Marâcine, DOC Mehedant, DOC Segatcea,	DOC Amd, DOC Alba Iulia, DOC Lechinija, DOC Sebeş Apold, DOC Tărnave	DOC Insuriței, DOC Oltina
Wine regions with geographical indications (IG)	IG Viile Caraşulni, IG Viile Timişulni	1G Colinele Dobrogei	lG Dealurile Sătmarului, IG Dealurile Zarandului, IG Dealurile Crișanei	IG Dealunile Moldovei, IG Dealunile Vrancei	IG Dealurile Olteniei, IG Vin spumant Dealurile Munteniei, IG Dealurile Munteniei	IG Dealurile Transilvaniei	IG Terasele Donári
Main grape varieties	Chardennay, Fetească alba. Fetească regală, Muscat Ottonel, Pinot gris, Riesling, Tamăsoasa româneasca, Viognier	Aligote, Chardonnay, Crâmposse, Fetească alba, Fetească regală, Muscat Ottonel. Tamăioasa românească, Fetească neugra, Merlot, Pinot noir, Syrah	Chardomay, Fetească alba, Fetească regală, Muscat Ottonel. Mustossa de Maderat, Tamásoasa românească, Cabernet Sauvignon, Fetească neagră, Merlot, Pinot nour, Syrah	Aligoté, Bábeasca, Chardonnay, Crámposie selectionată, Fetească alba, Fetească regală, Galbena de Odobești, Grasa de Cotnari, Muscat Omonel Tamáioasa românească, Bususoacă de Bohotin, Fetească neagră, Merlot, Syvali	Aligoté, Chardonnay, Crâmposse selecționată, Fetească alba, Fetească regală, Grasa de Coman, Muscat Ontonel, Riesling, Tamăioasa românească, Busmoacă de Bobotin, Fetească neagră, Merlot, Nebbiolo, Negru de Dragășani, Syrah	Chardonnay, Fetească alba, Fetească regală, Muscat Ottonel, Pinot gris, Riesling, Cabernet Sauvignon, Fetească neagră, Merlot, Pinot noir, Syrah,	Aligoté, Chardonnay, Feteascà alba, Feteascà regalia, Muscat Ottonel, Pinot gris, Tamainoassa romàneascà, Traminer roz, Babeascà neagrà, Feteascà neagrà, Merlot, Pinot noir, Syrah

Source: www.oniv.ro processed information [21].

On the other side, Muntenia's grape production is in line with Oltenia in terms of variation, 2016 being the year of a major fall, and2017 the year of significant recovery reaching the maximum production for the chosen period. With reference to wineries, Muntenia has a larger number than Oltenia, being almost doubled. Also,in this area there are located six research and development stations for horticultural, viticulture and vinification, distributed equally between the two wine regions.

Dobrogea follows in regard to vineyard surface being the fourth in line of the total in Romania, while for the grape production touches 15% from the total production. The fact to notice is that even Dobrogea has less cultivated area than Muntenia, its grape production is bigger with around 2.4%. Wineries in Dobrogea wine region also include the places located in Terasele Dunării,

and from the total number it has also a research and development station for vinification and viticulture.

Grape production in Crisana and Maramures wine region had during the years many deviations also with sharp increase from 2017 to 2018, as well as significant drops in the last years due to the decrease of the vineyard surface. Even tough this wine region has only 4% of the total vineyard surface of the country, in the area there are numerous wineries and a research and developmnt station for viticulture and vinification. On the other side, Banat is the wine region with the lowest vineyard surface with no meaningful deviations over the chosen period, at the same time the grape production had an upward trend starting with 2017. In terms of wineries. in the area there are few and no institute or station for research and development for grape cultivation.

Vineyard surface of Transilvania had no big variations during the analysed period, while in regard to grape production the region achieves between 2017 – 2019 its biggest harvest, starting to drop in 2020. In the wine region of Transilvania there is SCDVV Blaj one of the research and development station for viticulture and vinification and various wineries across.

Furthermore, based on the wine region in Romania the wines are classified as Designation of Origin (DOC) and Geographical Indication (IG) [20].

In connection with the classification, on the etiquette of the wine bottle we can find this detail; also this repesents an attribute of the wine quality.

In Table 2 it is shown that all the wine regions from Romania have both areas classifed as DOC and IG, and the main grape varieties that are cultivated can be identified. Moldova is the area with the biggest number of DOC areas and has also various grape varieties cultivated, both native and international. As per the vineyards surface proportion, Oltenia and Muntenia are the regions with numerous DOC and IG areas and a great variety of cutivated grapes, while therest of the wine regions have almost the same number of areas

classifed as DOC and IG. With reference to grape varieties it can be identified that in all the wine regions there are cultivated native varieties such as Fetească alba, Fetească regală, as well as some varieties that can be found in only few areas (e.g. Mustoasa de Măderat, Crâmpoșie).

With refrence to the number of wineries in each wine region, as per Wines of Romania (n.d.) almost 500 wineries are active in the country. In Table 3 we can see the number of wineries that are mentioned on the website, and the number of wineries that have wine tourism services available to bookon the online platform winetourism.com.

Table 3. Number of wineries per wine region

Wine region	No. of wineries	Wineries with tourism services
Banat	19	-
Crișana and Maramureș	61	1
Moldova	120	1
Muntenia and Oltenia	137	10
Transilvania	47	1
Dobrogea	39	2

Source:www.winesofromania.com/www.winetourism.c om processed information [30].

Table 4. Wine tourism offer

Wine region	Vineyard	Winery	Service type	Price (EUR	Duration	Tasted wines	Wine types
Muntenia and Oltenia	Stefănești	Azuga Rhein Wine Cellar	Wine tasting and tour	23	60 min	3	White/Sparkling
Muntenia and Oltenia	Dealu Mare	Basilescu	Wine tasting and tour	18	95 min	4 to 6	Red/White/Sweet
Muntenia and Oltenia	Dealu Mare	Davino	Wine tasting and tour	23	60 min	No data	No data
Muntenia and Oltenia	Dealu Mare	Lacerta Winery	Intensive/Basic wine tasting and tour	12 to 16	90 min	4 to 6	Red/White/Sweet
Muntenia and Oltenia	Dealu Mare	Domeniile Sahăteni - Winery	Wine tasting and tour	25	90 min	4 to 6	Red/White/Rose
Muntenia and Oltenia	Dealu Mare	Vitis Metamorfosis - Winery	Premium/Basic wine tasting and tour	20 to 25	120 min	7 to 10	Red/White/Rose
Crișana and Maramure	ș Silvaniei	Carastelec Winery	Wine tasting and tour	15	95 min	7 to 10	Red/White/Sparkling
Muntenia and Oltenia	Mehedinți	Catleya Wine-Estate	Wine tasting and tour	20	90 min	4 to 6	Red/White/Rose
Dobrogea	Murfatlar	Crama Histria	Premium/Basic wine tasting and tour	12 to 16	no data	4 to 6	Red/White/Rose
Muntenia and Oltenia	Dealu Mare	Domeniile Franco-Române	Wine tasting and tour	19	90 min	4 to 6	Red/White/Sweet
Dobrogea	Sarica Niculițel	Măcin Winery	Wine tasting and tour	10.25	120 min	1 to 3	Red/White/Sweet
Transilvania	Aiud	Domaine Takacs Winery	Wine tasting	8	90 min	4 to 6	No data
Moldova	Galați	Crama Annwine	Visit and tasting	No data	30 min	1 to 3	Red/White
Muntenia and Oltenia	Mehedinți	Crama Oprișor	Wine tasting	No data	30 min	No data	Red/White/Rose/Swe
Muntenia and Oltenia	Cotesti	Crama UNU	Wine tasting and tour	No data	90 min	No data	Red/White/Rose/Swe

Source: www.winetourism.com processed information [29].

Moreover, in table4it can be identified the wineries that have already in place wine tourism services as per the wine region. These wine tourism packages are sold online by winetourism.com, an online platform that

promotes wine tourism from all over the world. On this website people can choose the location where they want to go, and the platform is showing the available services for the chosen location. In Romania's case after

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the search, 15wineries are listed with the type of activities that they offer, the price and the duration of the activity. Primarily Muntenia and Oltenia wine region is the area that has the most places listed, while the rest of the wineries are from Dobrogea, Moldova or Transilvania.

In regard to the service types the main activity is wine tasting and winery tour, while some wineries are offering also premium wine tastings that consists in a larger number of tasted wines.

Most of the wine tastings includes four to six wines from all the wine types produced (red, white, rose or sparkling wine). The price for such an activity is between 10 to 25 euro per person where the tour and the wine tasting lasts for about 80 minutes on average.

#### **CONCLUSIONS**

From the wine industry perspective, the stage of development of each country is different, as the variations between wine production, exports, imports and consumption are quite significant.

Overall, currently Romania does not stand out with considerable volumes compared with the main wine producing countries for the chosen period, however it ranks 13<sup>th</sup> worldwide on the wine production. Thus, it can be concluded based on Sigala (2019)wine performance factors that Romania needs improvements in regard to good management of wine related resources. Nevertheless, it was seen that in terms of wine exports the country has the lowest rate versus the others nations which should be a focus point in the future in order to increase the exports to create greater visibility on the wine market worldwide.

In terms of vineyard surface, in Romania compared with rest of the countries it can be seen that the country has a trend of growth over the analysed period and a great potential for development as it was seen that the wine regions are very well delimited.

From the second part of the analysis, it is clear from the evidence that Moldova has a great potential for wine tourism development in the future years, not only because it has the biggest vineyard area and due to the fact that it is the main wine producer of the country, but also because in the area there is a significant number of wineries. In spite of that, as seen Moldova at the moment does not have many wineries that offer wine tourism services, thus this could be a segment to develop in the future in order to expand their businesses. The wine regions that currently have the most wineries that promote their wine tourism services online are located in Muntenia and Oltenia.

Furthermore, Romanian wine industry showed a huge potential of expansion, taking into consideration the regulation of the protected wine areas that guarantees for a qualitative wine, that puts the country together with the biggest wine producers of the world .As illustrated, each wine region considerable number of wineries that could be visited. Even tough, on the online platforms there are only a few wineries that offer wine cellar tours and wine tastings sold by third parties, if the people are interested in a specific winery, they could further search more details online about wine tourism services. In regard to wine destination performance factors, Romanian wine tourism needs support for tourism services, amenities and facilities to provide the services and a strong destination image in order to promote the wine regions.

To conclude, the rise of Romanian wine sector must keep the direction of expansion and improvement in order to sustain the development of wine tourism.

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