

# The problems of winemaking in Poland: a case study of winemakers on the Małopolska Wine Route

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## **Abstract**

*Wine production and consumption in Poland is located in a niche area, but along with social and economic changes. Polish wine market became one of the most dynamically growing in Europe, similar to local wine production. Developing wine manufacturing branch in the suitable regions, might be a chance for diversification of activities of the farms, strengthening agritourist offer and developing the trails of thematic tourism in Poland and contribute to a cultural change in a model of alcohol consumption in Poland. The aim of the paper was to identify the main problems hindering a development of this new branch of agricultural production activity, in a context of human depending phenomena. The research method based on fieldwork, observation in vineyards and winery and focus group interviews and a questionnaire conducted with owners of wineries and wine producers from Małopolska region. Those let us identify the areas of subjectively perceived problems of winemakers and formulate the weaknesses that may have a negative impact for development of this fledgling sector. The main problems reported by manufacturers in a questionnaire were related to legal and institutional issues of winemakers in Poland, also there was pointed a question of an access to relevant plant protection products in a context of possibility of carrying organic farming and a problem of certification. The focus group interview, revealed some internal problems of Polish winemaking, connected with social and human capital and lack of sufficiently coherent vision of development of the Polish wine manufacturing sector.*

**Key words:** Polish Wine, Małopolska Wine, winemaking, wine region

**JEL Classification:** Q10

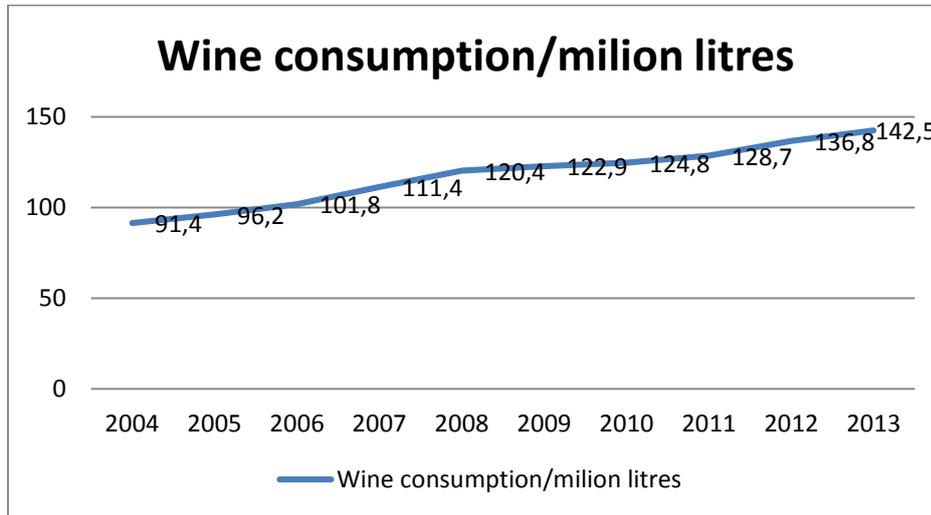
## **Introduction**

The history of Polish winemaking dates back to the early Middle Ages, as is confirmed by archeobotanical findings made in Cracow. Seeds of *vitis vinifera* dating from the IX-Xth century have been found on the slopes of Wawel Hill (Muller-Bieniek, 2012, p. 85.). The cultivation of vineyards and winemaking developed after the adoption of Christianity, along with growing needs for altar wine. In and around medieval Cracow, vineyards were cultivated by monks from the Benedictine Abby in Tyniec and the Norbertine Order on Saint Bronisława Hill. The seeds of a vine from the later Middle Ages period have also been found in the area of the Main Square (Muller-Bieniek, 2012, p. 85). The Małopolska region was the first location for wine cultivation in Poland. Although, in the Subcarpathian region, traces of vine cultivation have been found dating back to the XIth century, it was along the Vistula river in towns like Sandomierz, Toruń or Płock (Włodarczyk, 2008), on the western border of today's Poland in Zielona Góra from the XIIth century (Kuleba, 2013) and from the XIIIth century in Western Pomerania in the Szczecin area (Rzeszotarska-Pałka, 2012). Political, natural and social changes, that started already in the XVIIth century, led to the disappearance of the tradition of winemaking and wine drinking. The end of XXth century has brought a return of wine to Polish tables and the planting of vines in Poland.

Wine consumption in Poland is considered one of the lowest in Europe, but at the same time it is growing very dynamically, and the speed of growth of the wine market over the period

2005-2015 amounted to 51.7%, whereas the rate of growth was 30.3% for vodka and 38.9% for beer (Ambra, 2015). Wine has become the third category of alcohol consumed in Poland, accounting for 7.4% of the alcohol market, after beer (34.6%) and vodka (51.1%) (Ambra, 2015). According to a research study conducted by KPMG (2014), 35% of adult people in Poland have consumed wine within the last month and 76% within the last year. In the period 2004-2013, a significant increase was reported in the level of consumption and the amount of money<sup>1</sup> spent on wine, as is presented in graph 1.

**Graph 1: Wine consumption in Poland, 2004-2014**

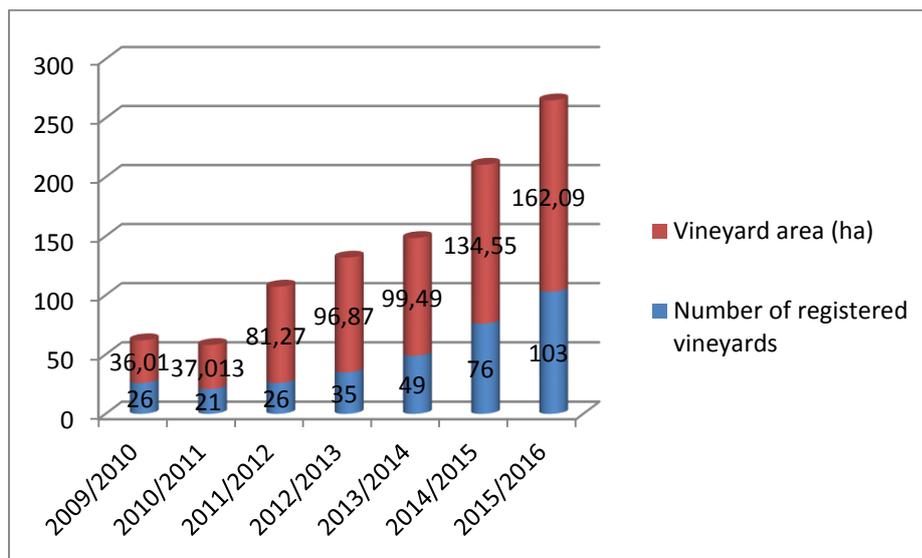


Source: KPMG Report, *Rynek napojów alkoholowych w Polsce*. 2014.

The growing interest in wine also manifests itself in an increase in the popularity of vine cultivation and wine production. This phenomena started in 1980s and became particularly dynamic at the beginning of XXIst century. It is difficult to indicate an accurate number of vineyards in Poland, as the majority of them are not officially registered entities, used for production for the owners' own needs. However, according data from the Agriculture Market Agency (ARR), there are around 700 vineyards, with 104 of these already officially registered and allowed to sell their product in the 2015/2016 season, proof that more and more winemakers in Poland are starting to treat this activity as a profession rather than just a hobby. Graph 2 presents the changes in the number of registered vineyards and in registered vineyard area.

<sup>1</sup> Wine expenditure in billions of PLN: 2004: 1.1; 2005: 1.2; 2006: 1.3; 2007: 1.4; 2008: 1.6; 2009: 1.7; 2010: 1.8; 2011: 2.1, 2012: 2.3; 2013: 2.8 (KPMG).

**Graph 2: The number of registered vineyards and their area in Poland**



Source: Agricultural Market Agency Report, *Rynek wina w liczbach*, 2016.

Polish winemaking is still a niche business, but it is indicative of global trends of thematic tourism, affects the maintenance of the landscape, offers an alternative path in agribusiness and answers growing wine demand in Poland. It is therefore worth specifying the areas in which problems are being encountered.

### **The scope and methodology of the research**

This paper aims to define the main threats and weaknesses being reported by Polish winemakers, arising out of the institutional environment (this paper does not focus on problems arising from natural conditions). The geographical scope covers the winemakers of Małopolska, one of Poland's most significant wine regions<sup>2</sup>, where there are over 60 vineyards ([www.winogrodnicy.pl](http://www.winogrodnicy.pl)), 21 of which operate as part of the Małopolska Wine Trail ([www.malopolskiszlakwinny.pl](http://www.malopolskiszlakwinny.pl)), from whose members a research sample was selected, using a snowball method (Voicu, Babonea, 2011). The research used a qualitative approach. In order to identify the problems winemakers are facing, individual in-depth interviews were conducted with 11 of the winemakers, based on a questionnaire containing closed and open questions, referring to the following subjects: 1) Vineyard data: a) Legal status (registered/non-registered) 2) Winemaker data: a) Education b) Cooperativeness 3) Issues addressed 4) Data irrelevant from the point of view of this paper. Each of the questions relating to the above subjects, also allowed some space for the winemaker to freely express their views on the issue discussed. All the interviews were conducted during the period from February 2015 to November 2015.

### **Findings**

The interviews revealed a number of problems faced by winemakers and different approaches to winemaking and wine business. Table 1 contains a concise summary of the responses given. However, the main areas of problems highlighted relate to those that arise from the external environment and internal community of winemakers. Among the issues indicated

<sup>2</sup> Polish wine regions are focused in the south and west of the country: Zielona Góra region, Silesia region, Małopolska region, Subcarpathian region and Lesser Polish Gorge of the Vistula region.

relating to the internal environment, the respondents identified problems referring to human and social capital such as: lack of in-depth knowledge and experience of winemakers, unwillingness to register activity, which can affect the quality of wine in Małopolska and have an impact on its image; and reluctance to cooperate. The interviews also revealed a certain dissonance between the winemakers from various subregions<sup>3</sup>. Among problems of an institutional nature, the most emphasized were: a lack of interest and support from the state and local governments; limited possibilities of obtaining financial support for vine growing and processing; a risk of excessive controls from various administrative entities; complicated administrative processes; insufficient availability of quality training; problems with access to organic / ecological plant protection products and limited availability of suitable conventional products of that kind, as well as the low level of activity of wine organizations.

The issues of human and social capital within the internal community of winemakers of the Małopolska region can be a potential obstacle to the development of a Polish wine industry. The significance of knowledge and its transfer is a crucial issue for the growth of this business. Małopolska winemakers are usually responsible for all levels of operations, from administrative issues, via gardening and plant maintenance, sales and marketing, to the winemaking process. That requires a wide knowledge. Although all interviewed winemakers declared a willingness to share their knowledge (two suggested it would be a paid service), the main problem is a lack of proper basics and education in the first place. Only one winery said that it employed a professional winemaker, one of the owners had an education in a related field, two people declared supplementary study or training<sup>4</sup>. The others were self-educated by "trial and error", often not having a vision of the effect that they would like to achieve. Human capital can, however, be increased by participation in a network, also one of the dimensions of social capital. The other issue is an institutional environment that is, according to the opinions of winemakers, is hindering development. The problem of social capital among Małopolska winemakers and an analysis of the institutional problems highlighted will be a subject for further consideration.

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<sup>3</sup> Wine subregions of Małopolska focussed around Cracow and Tarnów.

<sup>4</sup> In Poland, the offer of oenological studies is limited. The Jagiellonian University in Cracow offers a year-long postgraduate training course, while the University of Agriculture in Cracow offers a 7-semester course of weekend studies in winemaking. The University of Wrocław has prepared a postgraduate course, and a course in winegrowing and winemaking is also available in Sulechów, as a specialization in gardening, and at the Podkarpacka Akademia Wina (a private entity).

**Table 1: Characteristics of legal status and human capital of Małopolska winemakers and the issues they identified**

|     | Legal status   | Education/knowledge  | Other remarks  |
|-----|----------------|--|--|
| V1  | R <sup>5</sup> | *Self-education<br>*International and local training<br>*Sharing knowledge                   | *Too few registered vineyards *Non-registered vineyards lowering the level of quality of Polish wine *Lack of wine culture in Poland<br>*A need for a technological centre (preferably in Cracow) and a well-equipped laboratory available to all Małopolska winemakers<br>*Low level of cooperativeness of Małopolska winemakers              |
| V2  | R              | *Oenology studies  | *Lack of biological/ecological plant protection products *Lack of knowledge and experience of winemakers *Low level of cooperation of winemakers *Lack of interest and support from the state *Limited possibilities of obtaining financial resources  |
| V3  | NR             | *Self-education<br>*Sharing knowledge<br>*Local training                                     | *Lack of biological/ecological plant protection products   |
| V4  | NR             | *Chemistry degree<br>*Self-education   | *A fear of excessive control prevents winemaker from registration *Lack of interest and support from the state *Limited possibilities of obtaining financial resources * High administrative cost of registered production   |
| V5  | R              | *Self-education<br>*Sharing knowledge<br>*Local training                                     | *A fear of excessive control *Too complicated administrative process for legal wine sale<br>*Low level of cooperativeness of Małopolska winemakers   |
| V6  | R              | *Self-education<br>*Sharing knowledge<br>*Local training                                     | *Lack of suitable selection of plant protection products<br>*Lack of interest and support from the state   |
| V7  | NR             | *Self-education<br>*Sharing knowledge<br>*Local training                                     | *High administrative cost of registered production<br>*Too complicated administrative process for legal wine production and sale<br>*A fear of excessive control   |
| V8  | NR             | *Self-education<br>*Sharing knowledge<br>*Local training                                     | *High administrative cost of registered production<br>*Too complicated administrative process for legal wine production and sale<br>*A fear of excessive control   |
| V9  | R              | *Postgraduate oenological course<br>*Self-education<br>*Sharing knowledge<br>*Local training | *Polish winemaking is still in the learning phase, this results in errors being made by winemakers and stakeholders<br>*There is no institution for certifying organic production of wine  |
| V10 | NR             | *Self-education<br>*Sharing knowledge<br>*Local training                                     | *Lack of a support from local government *Available training is poor *Winemakers from region of Tarnów and Kraków presenting different point of view for cooperation - lack of cooperation within the region * High administrative cost of registered production<br>*Too complicated administrative process for legal wine production and sale |
| V11 | NR             | *Self-education<br>*Sharing knowledge  | *High administrative cost of registered production<br>*Too complicated administrative process for legal wine production and sale   |

Source: own research (2015).

<sup>5</sup> R - Registered, with permission for sale. NR - Not registered, no ability to sell.

## Does Social Capital Matters for Winemaking?

Social capital can be defined as *features of social organizations, such as networks, norms and trust that facilitate action and cooperation for mutual benefit* (Putnam, 1993). Its significance has been the subject of extensive research, proving its influence on numerous phenomena relevant to the subjects discussed here, including its relations with education (Aldrige, 2002), community governance (Bowles, Gintis, 2002), cooperation within sectors (Brown, Asham 1996), regional development (Lyon, 2000), economic development, efficiency of institutions or stability of economic system and democracy (Fukuyama, 2001). Social capital is however a multidimensional phenomenon, based on trust, volunteerism, neighbourhood connections, everyday sociability, togetherness, generalized roles, group characteristics (number of members, frequency of participation, participation in decision-making, contribution of money, source of group funding, etc.) (Narayan, Cassidy, 2001). The significance of these phenomena was recognized by S. Cinotto in his book entitled *Soft Soil, Black Grapes: The Birth of Italian Winemaking in California*, where he writes about a successes of Italian winemakers in California, achieved also thanks to the social capital of strong community and participation of winemakers in their ethnic economy (Cinotto, 2012, p. 93-105). The significance of social capital for the winemaking industry was also confirmed in Okanagan, British Columbia, Canada (Hickton, 2004), where the government introduced a strategy to give support to quality winemaking<sup>6</sup>, and social capital was put to use to enable this strategy to achieve optimum results; and in the Brazilian wine industry (Manke, Gennari, Faccin, 2012); and in the Transdanubia region of Hungary, where research came to the conclusion that a high level of trust and confidence facilitate the formation of intercompany relations, which in turn allows potential risk to be shared and makes problem-solving easier (Brányi, Józsa, 2015). Social capital was also positively correlated with length of residence in a wine tourism research study (Barbieri, Xu, Leung, 2014) and, as proven by Alonso and Bressan, small family wineries are themselves important contributors to social capital and socio-economic development (2013). The declarations made by Małopolska winemakers, due to the limited size of the sample, do not have the overall merit of statistic surveys. However, they do show a certain pattern within the region. Using the simplest typology of social capital: bonding (connecting closest groups, people with similar situation) vs bridging (linking different groups, can generate broader identities and reciprocity, may be more valuable from the point of view of socio-economic development) (Putnam, 2000, pp. 22-23), it is possible to note a certain advantage of bonding over bridging capital. All the winemakers were members of a formal project, however the project was created by an external entity and was not a common initiative<sup>7</sup>. 10 out of 11 declared they can rely on other winemakers from the region for

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<sup>6</sup> Wine tradition in Okanagan region started in 1920. However, in 1981 there were still only 14 wineries, most with hybrid grapes, whereas, in 2002, there were already around 100. A strategic support plan was created by both the industry and government, the British Columbia Wine Institute being designed in part to remove labrusca and hybrid grape varieties and replant vineyards with *vitis vinifera*. *The Vintners Quality Alliance (VQA) program was developed in the early years of the British Columbia Wine Institute, in cooperation with the industry in Ontario, to provide standards for wine, certification criteria, and market development support for premium wines produced by participating wineries. The Okanagan Wine Festival Society was established twenty years ago by a group of wineries and tourism operators who believed in developing awareness of the young wineries at the time. The annual event has experienced tremendous success which has paralleled the growth of the wine industry. These three formal organizations are some of the more popular groups with a large membership base.* (Hickton, 2004).

<sup>7</sup> The following questions were asked to identify the level of social capital: 1) Do you belong to a formal organization/project unifying winemakers of the region? 2) Can you rely on informal support of the winemakers from a region? 3) Are you willing to share your knowledge and experience with other winemakers? Do you have a friendly relations with other winemakers from a region / country / abroad? 4) Defining a main goal of winemakers activity you see it as... 5) Do you expect regional winemakers to act together for one aim? 6) Have you acted together or do you have any plans to act together to achieve one common goal?

informal support. 10 of 11 declared a will to share their knowledge and experience with their colleagues (two of them if it would be a paid service). All the winemakers maintained relations with some of their colleagues from within the region (10/11), the country (11/11) or abroad (4/11), and, regarding the significance of their relations with other winemakers, 10 out of 11 chose the option "we are acting for one common goal" (only one person chose the response "we are competitors"). Those answers show bonds within the group. What is however interesting is that non-registered winemakers tend to be more reliant on group support than registered ones. One of registered winemakers said in an interview: *Nobody really knows how their wine is made (of not registered colleagues), what they are adding... another: without registration, we cannot really begin to think about consistent quality of wine from a region.* Five producers admitted the existence of some confusion between winemakers from the Cracow and Tarnow regions. There are two dividing lines here - regional and legal. Nobody however described this situation as one of conflict, and one of the respondents declared: *Most people try to cooperate. We take part in conventions, and act democratically. We must act together, as we are all winemakers.* In contrast, bridging capital tends to be much weaker. Among the winemakers interviewed, nobody believed they can act together towards achieving one common aim, by establishing relations with external groups or entities. One of the winemakers said: *I don't like this idea of forming a lobby at all. This is something that should be done by individuals.* Another confirmed: *I don't want to take a part in anything like it (acting for one common aim). I just want to make wine. Or: There is no chance that people will act together. Maybe just a small group could be motivated enough to do so and: I think as winemakers, we do not actually have the same aims.* A passive attitude toward external entities was also present in the answers given to the question "Have you acted together or do you have any plans to act together to achieve one common goal?", there was no joint initiative or project. Only two respondents said that they had organized an educational project together. Diagnosing the social capital of the winemakers of the Małopolska Wine Trail, it can be seen that there is a certain feeling of helplessness with regard to external entities, expecting the initiative rather to be taken on their part. This is reflected in the main problem and issues the winemakers are facing: relations with controlling and supporting institutions, which will be discussed in the following part of this paper.

### **Institutional problems of winemaking**

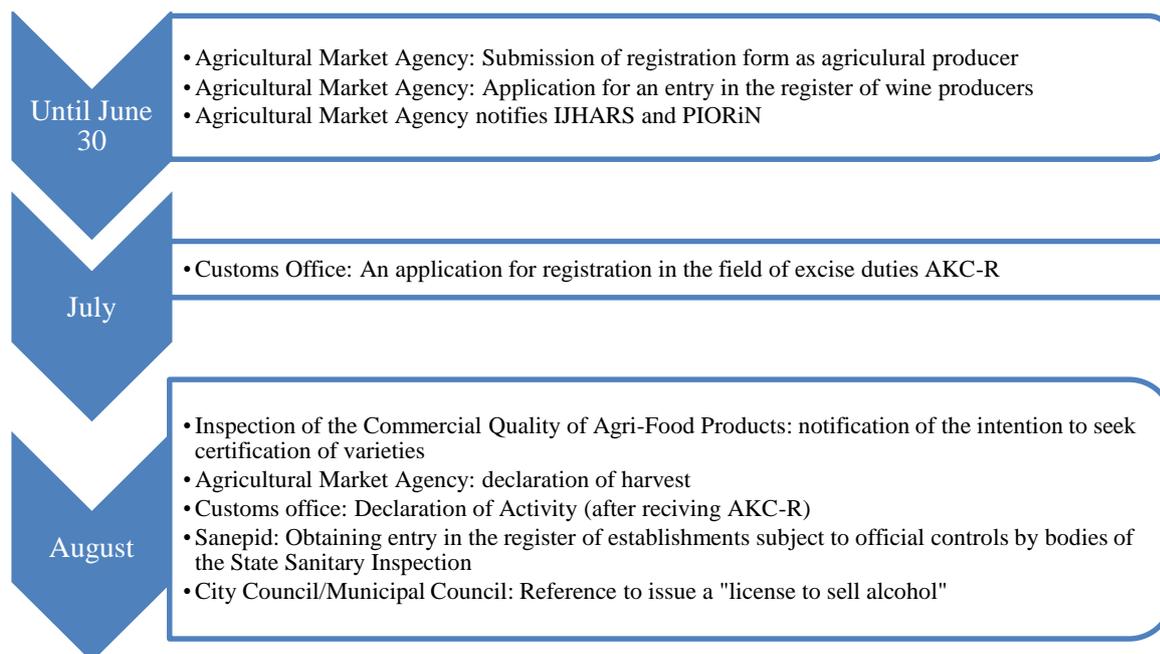
The institutional problems the winemakers are facing are perhaps often not being presented to the legislator, because of a lack of common initiative. At the same time, according to the winemakers, the legislator has a tendency to ignore this growing industry, due to its niche character, and does not try to meet its needs. There is a distinctive distance to power among the winemakers, as evidenced by following quotes: *The government doesn't care about the wine industry, only vodka is important... The only thing the government wants is to earn money from the wine sector. But it barely exists!... or: I don't want to register my activity - what for? To have constant inspections, extra cost of excise, VAT... I run an agritourism service<sup>8</sup> and so I don't need to worry about any of that...otherwise, I think I would have to have a customs warehouse... and: Listen! Do you know how many controlling bodies can come to check up on me if I'm a registered winemaker? Nine! Nine entities can control me!* This high distance to power results in a reluctance among winemakers to formalize their activity, which in turn has an effect on the general quality of the product, causes splits among winemakers, weakens the market power of the Małopolska wine industry and the development of the sector as a whole. However, the registered winemakers shared the opinion

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<sup>8</sup> Majority of winemakers prefer to offer their product as a part of an agritourism service.

that though the number of possible controls is indeed high, in practice there are not many and that they are not too onerous: *I was worried about all those controls, but it's not too bad, so far... They threatened us with continuous controls. I had three this year...* In practice, there are five institutions with the power to control the winemaking process – the Customs Office, Tax Office, Agricultural Market Agency, IJHARS (Inspection of the Commercial Quality of Agri-Food Products), State Inspection for Plant and Seed Protection (PIORiN) and Sanepid (State Sanitary Inspectorate). However, each part of the production process may be subject to a control. The bureaucratic procedure of registration and controlled wine production is a highly formal process, including 9 stages in the annual production cycle, as presented in graph 3.

**Graph 3: Process of registration for wine production and sale**



Source: own study, based on (Rosól, 2014).

Moreover, winemakers are obliged to submit up to 6 declarations per year to the Agricultural Market Agency regarding planned harvest, production, and production and stocks from the previous year (*Ustawa z dnia 12 maja 2011, Dz. U. Nr 120, poz. 690*) and to develop and pursue in written form an internal control process covering: 1) the frequency and method of taking samples for quality tests; testing methods; methods of dealing with wines presenting substandard quality requirements 2) securing and disposal of waste generated during the wine-making process 3) keeping a record of wine input and output 4) reporting the intention to carry out oenological processes, i.e. enrichment, de-acidification or sweetening (*Obowiązki producenta*, IJHARS, 2015). The procedure is thus discouraging for many winemakers, not just because of the bureaucratic issues involved but also because of the cost of administrative procedures.

Another problem highlighted concerned the co-financing of the wine business. The winegrowers only had access to a basic subsidy and then only for the farms bigger than 1 ha. The two first editions of the PROW (Rural Development Program) overlooked the phenomenon of Polish winemaking. During the period 2007-2013, winemakers could apply for funds for modernization of a farm. But only the 2014-2020 edition of the program is supposed to give winemakers access to realistic support, recognizing their real production profile and offering a range of tools for the farms not bigger than 300ha. The aid is planned in the form of the reimbursement of a portion of eligible costs (up to 50% or 60% in the case of

collective investment or investment by young farmers) and not less than 30% of eligible costs. There are also plans for the possibility for young farmers, under 40 years old, to take a part in a program, which also extends to winegrowers. Support can also be sought for winemaking under the sub-initiative "Processing and marketing of agricultural products". Lastly, the project for PROW 2014-2020 also provides support for cooperation between farmers, up to an amount of 15,000,000 PLN (KRiR, 2014)<sup>9</sup>.

## Conclusion

The Małopolska winemaking industry is still a niche activity. However, the growth in wine consumption, coupled with the increasing popularity of Slow Food and Local Food movements, means the prospects for winemaking in Poland are interesting. The main obstacles highlighted by the winemakers concern the institutional environment and the low level of support given by the government to this particular activity. A short analysis of administrative registration process and the bureaucratic obligations of winegrowers and wine producers confirm those remarks. The number of controlling institutions and levels of control bid the question of the relationship of trust between the state and manufacturers. Also omitting winegrowers and winemakers in two first editions of the PROW Rural Development Program did not help to build a relationship of trust between the state and wine manufacturers. A low level of bridging social capital, another issue raised by winemakers, tends to be related with such institutional problems. The developing wine culture in Poland, which is important from the point of view of social change, the tourism industry, diversification of agricultural activity and market trends, needs real support from government, support of the kind that will let the fledgling sector become competitive on the global market in the future, instead of leaving Polish winemaking neglected to remain a hobby activity treated as a curiosity. To achieve this goal, the winemakers, who are the founders of the industry as it is today, need to be more unified and cooperate more strongly together.

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<sup>9</sup> The respondents interested in ecological production were also admitting a problem with eco certificates, and lack of certifying institutions. The responsible for certification entities (in example Biocert from Cracow) declared however full ability for certifying wine, hence, subject of certification problems was not discussed in details in this paper.

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