

## WINE MARKET DEVELOPMENT IN POLAND AND ITS IMPACT ON REGIONAL ATTRACTIVENESS

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**Purpose:** The primary purpose of this article is to present issues related to the development of the wine market in Poland and its influence on the attractiveness of regions. The specific aim is to identify contemporary trends in the development of the wine market and to analyze their impact on the growth of regional interest.

**Design/methodology/approach:** The author focused on analyzing the available literature and sources of information on the wine market, wine regions, trends, and their influence on the attractiveness of regions. The author based his considerations on Polish and foreign literature, studying scientific articles and electronic sources. To collect scientific literature, the author used the following professional scientific databases: Library of Science and Google Scholar.

**Findings:** In recent years, Poland has become a significant producer of wine, which attracts investment and stimulates the development of local economies. The observed increase in the quality of Polish wines makes wine regions more competitive internationally, which translates into increasing wine production and quality. This dynamic development of the wine market in Poland has a positive impact on the attractiveness of the regions, contributing to increased wine production, the promotion of local culture and heritage, the development of the catering industry, support for sustainable agricultural development, and the development of the tourism sector.

**Social implications:** An increase in wine consumption in Poland has been noted since the 1990s, and Poland is becoming an increasingly promising market with long-term development prospects. Despite this, Poles still consume considerably less wine than the European Union average and even ten times less per capita than citizens of traditional wine regions. This indicates a significant, as yet untapped potential. Polish consumers are becoming increasingly knowledgeable about wine and are showing a growing interest in the beverage. What is more, wine fits in perfectly with current trends. Consumers today approach alcoholic beverages with increasing attentiveness. Tastings, celebrations, and the skillful pairing of wine with meals are increasingly valued, adding a unique flavor to everyday routines. It is observed that declines in the wine category are much smaller compared to other alcoholic beverages. It is worth understanding that these short-term declines are mainly due to the current economic situation and are only a temporary phenomenon. The future of the wine market in Poland, therefore, seems promising (ISBNews, 2023).

**Originality/value:** The author aimed the article at entities/recipients including, but not limited to, entrepreneurs in the wine industry, investors who are considering investing in vineyards, wineries, or related services; people working in the tourism industry, including owners of hotels, restaurants, tourist agencies, etc., who can gain insight into how the developing wine

market affects the attractiveness of tourist regions. Those working in local and regional government - can find inspiration in the article on how to use wine development to promote and develop their regions. Consumers and those interested in learning more about winemaking can also find information on trends and opportunities in Polish wine in the article.

**Keywords:** history of winemaking in Poland, development of the wine market, attractiveness of regions, wine tourism.

**Category of the paper:** Research paper.

## 1. Introduction

Wine-making traditions in Poland have their roots going back to the Middle Ages, although, over the centuries, they have experienced periods of boom and stagnation. However, the vital impulse for winemaking in Poland was the country's accession to the European Union. Currently, based on data from the National Agricultural Support Centre (KOWR), the Polish wine market is developing intensively. In 2020/2021, 8 691.84 hectolitres of wine were marketed, in terms of approximately 1 million 159 thousand 0.75 liter bottles (KOWR, 2022). According to statistics, as of 15 September 2023, there were 552 wine growers in Poland, cultivating vines on an area of 835 hectares, as well as 267 entrepreneurs conducting activities related to the production and bottling of wine products (KOWR, 2023).

In turn, according to Eurostat data, Poland imported 268 357 hectolitres of wine in the 2021/22 marketing year. According to a report by the NielsenIQ Institute, the value of the entire category amounted to around PLN 4.3 billion, an increase of 7.6% compared to 2021. In terms of volume, the segment recorded a minimal decline of just 0.3%. Total sales of wines and liqueurs in Poland amounted to PLN 4.7 billion, an increase of 10.3%. In addition, research has shown a growing interest in flavor, especially in the sparkling wine category. In the first half of 2023, sales of so-called 'spritizers' increased by almost 9% in value terms.

Interestingly, Poland is showing great interest in wine production, and the rate of development of Polish winemaking stands out even in the international arena. Between 2009 and 2021, the area of vineyards increased more than 17 times, and wine production in Poland increased as much as 34 times. The number of entities involved in wine production increased 18-fold. In the 2021/22 season, 6 358.08 hectolitres of red wine and 12 083.71 hectolitres of white wine were produced in Poland, making a total of 18 444.79 hectolitres (XBS PRO-LOG S.A., 2023).

In addition, the development of the wine market can also have a significant impact on the attractiveness of regions, both economically and in terms of tourism. A growing wine sector can influence the attractiveness of regions in such aspects as job creation, wine tourism, development of tourism infrastructure, increase in production of local products, development of culture and heritage, impact on property values, and impact on education and research.

However, it is worth noting that a growing wine market can also present specific challenges, such as the need for sustainable water management and environmental protection. Therefore, wine is essential to develop sustainably to preserve its unique identity and traditions.

The main objective of the article is to present issues related to the development of the wine market in Poland and its impact on the attractiveness of regions. The specific objective is to identify contemporary trends in the growth of the wine market and to analyze the effects of the increase in interest in the region.

## **2. Methodology**

The author used the Desk Research method to prepare the above article. Desk Research is a type of research that involves collecting information and data from available secondary sources, such as publications, reports, scientific articles, statistics, databases, archival materials, and online sources, without collecting primary data. It is one of the basic research methods used in social sciences, business, and other fields.

The author focused on analyzing available literature and information sources on the wine market, wine regions, trends, and influence on the attractiveness of regions. The author based his considerations on Polish and foreign literature, studying scientific articles and electronic sources.

The bibliography includes 24 items: scientific articles and electronic sources. In the desk research analysis, the author used professional scientific databases. The author used these scientific databases due to the possibility of collecting literature for this article.

## **3. The history of winemaking in Poland**

The history of winemaking in Poland goes back a long way, beginning in the pre-Christian period. From ancient times, wine has played an important role in the country's culture and economy. Ancient sources indicate that winemaking on Polish soil already existed in the 9th century (Wituch, Wróbel, 2002). At that time, the leading wine producers were monasteries, which ran vineyards on Polish territory (Wituch, Wróbel, 2002).

The first vineyards on Polish territory appeared as early as the 13th century, often established in the surroundings of castles and monasteries (Kubal, Piziak, 2010). The areas where these vineyards were located were mainly around Kraków, Krosno, Sandomierz, Lublin and Włocławek and Płock (Milan-Lewicka, 2022). In the 14th century, King Casimir the Great played a crucial role in developing winemaking in Poland, supporting

its growth. Kraków became a significant wine-making center during this period (Wituch, Wróbel, 2002).

The turn of the sixteenth and seventeenth centuries brought a significant cooling of the climate, which influenced the decline of viticulture in Poland and increased imports of wines from southern Europe (Makowski, Miętkiewska-Brynda, 2015). These were difficult times for domestic winemaking. It was not until the first half of the 19th century that Polish winemaking was revived, especially in today's Lower Silesia and Lubuskie Voivodeship (Brodnicka, 2019).

During the partition period and later, during the communist rule, winemaking in Poland suffered due to the policy of the partitioners and the collectivization of agriculture (Chwalba, 2000).

After regaining independence in 1918, winemaking began to revive, and the inter-war years were a period of growth for the industry (Dorosz, 1992). Unfortunately, World War II and its aftermath caused a regression that led to the almost complete disappearance of vineyards on Polish soil (Pink, 2015). On the other hand, after World War II, winemaking in Poland suffered due to communist policies (Chwalba, 2000).

Only after the political transformation in Poland in the late 1980s and early 1990s winemaking started to develop dynamically. The number of wineries increased, and the quality of Polish wines gained international recognition (Kuligowski, 2016).

Poland became an increasingly important wine producer, gaining recognition among wine lovers and experts worldwide (Kuligowski, 2016).

Contemporary winemaking in Poland is much more developed than in the past and enjoys growing recognition at home and abroad. Polish wines are winning awards at international competitions, and wine regions such as Małopolska, Lower Silesia, and Lubuskie are becoming increasingly attractive to wine lovers and tourists alike.

It was only in 2009 that the European Union fully legalized Polish wines, opening up new opportunities and development prospects for the industry.

A significant stage in the development of the Polish wine market was the amendment to the Excise Duty Act of 2008 (Council Regulation (EC) No 491/2009 of 25 May 2009). This amendment provided for the exemption of producers from the obligation to maintain a tax warehouse provided that wine production did not exceed 1,000 hectolitres per year. The amendment was necessary to adapt the national legislation to the requirements of the European Union. Moreover, it is essential to consider the dynamic development of the wine industry in Poland (Wójcik, 2022).

The new legislation on wine production and regulation of the wine market is set out in the Act of 2 December 2021 on wine products (Dz.U. 2022, item 24). The new law, which came into force on 7 March 2022, replaced the regulations in force since 12 May 2011 concerning the production, bottling, and marketing of wine products, as well as the organization of the wine market.

The new Act defines the rules for the organization of the wine market, setting out, among other things, issues relating to the making and labeling of fermented wine products. The provisions also include guidelines on conducting business activities related to both the production and bottling of wine. An essential element of the Act is the introduction of an obligation to keep records of vineyards in Poland. Vine producers are obliged to make a one-off entry in this register at the request of a person cultivating vines. The vineyard register is open to the public. It is kept by the Director General of the National Agricultural Support Centre, who is also responsible for registering entities involved in the production and bottling of wine products (Wójcik, 2022).

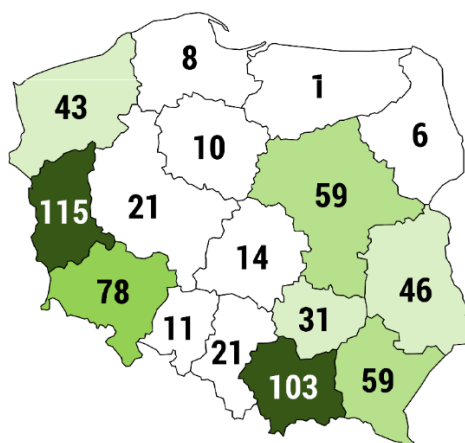
In addition, the new regulations require producers of wine from their cultivation to notify the National Support Centre for Agriculture of their plans to make wine from grapes and to do so by mid-September of the wine year in question at the latest. This notification is compulsory and aims to provide information on wine production. The new law also introduces specific obligations for wine producers and standardizes standards relating to the certification of varietal and vintage wines. It also defines the body responsible for liaising with the European Commission on wine market issues, the Minister of Agriculture and Rural Development. As part of the control of vine cultivation, the Provincial Plant and Seed Inspectors are responsible for monitoring the compliance of data on the names and origin of vines reported by growers. On the other hand, the Provincial Inspectors of Commercial Quality of Agricultural and Food Products certify varietal and vintage wines at the request of the producer; they also carry out official control of outgoings and incomes, transport documents of wine products, and control the commercial quality of wine marketed. This new law has contributed to regulating the wine market in Poland, creating clear standards and rules for the industry (Wójcik, 2022).

#### **4. Current state of the wine market in Poland**

Due to the evolving model of alcohol consumption, consumers in Poland, as in other countries, are more and more willing to choose grape wines, which is confirmed by growing sales levels. In the 2020/2021 marketing year, 2740.04 hl of white wine and 5951.80 hl of red wine were marketed.

In the 2021/2022 marketing year, KOWR (the National Agricultural Support Centre) also recorded a 15% increase in the number of producers and entrepreneurs applying for an entry in the register kept by the Director General of KOWR compared to the previous 2020/2021 marketing year. A 10% increase in the area of notified vineyards is also observed compared to the previous marketing year, which is evidence of a continuing trend in the development of winemaking in Poland.

Data collected by the National Agricultural Property Fund indicates that in the 2021/2022 marketing year, the most significant areas of vineyard cultivation are observed in the Lubuskie (ca. 115 ha), Małopolskie (ca. 88 ha), Dolnośląskie (ca. 75 ha), Zachodniopomorskie (ca. 60 ha) and Podkarpackie (ca. 59 ha) voivodeships. Vineyards are also being established in other provinces, even those not usually associated with wine production due to unfavorable climatic conditions, such as the Warmińsko-Mazurskie Province (Agricultural and Agribusiness Promotion Agency, APRA).



**Figure 1.** Area of vineyards in (ha) reported to NEB for the 2021/2022 wine year.

Source: winogrodnicy.PL, 11.08.2023.

The provinces with the largest area of vineyards are Lubuskie (115 ha) and Małopolskie (103 ha). Other provinces with smaller vineyard areas are Dolnośląskie (78 ha), Mazowieckie (59 ha), Podkarpackie (59 ha), Lubelskie (46 ha) and Świętokrzyskie (31 ha). According to the data, the voivodeship with the smallest vineyard area is Warmińsko-Mazurskie (1 ha).

**Table 1.**

*Wine production and sales in Poland 2009/2010 - 2021/2022 marketing years - Data as of 23.08.2022*

Year	Number of producers (in the records)	Total area under vines (in ha)	Quantities of wine grapes (in quintals)	Sales in the marketing year concerned (in hl)
2009/2010	21	36,01	n.d.	n.d.
2010/2011	20	37,02	662,70	247,88
2011/2012	26	51,28	680,73	294,42
2012/2013	35	96,87	1 436,93	276,79
2013/2014	49	99,49	3 131,20	802,82
2014/2015	76	134,35	4 499,89	1 524,07
2015/2016	103	194,24	8 093,36	2 124,82
2016/2017	150	221,23	10 849,97	2 990,63
2017/2018	201	331,38	7 976,20	3 963,66
2018/2019	230	394,84	18 210,33	6 374,40
2019/2020	294	475,35	21 150,82	7 863,97
2020/2021	329	564,34	21 806,74	9 328,17
2021/2022	380	619,42	28 496,60	-

Source: National Agricultural Support Centre "Wine market in numbers", data as of 23.08.2022, <https://www.kowr.gov.pl/interwencja/wino>, 22.10.2023.

The number of wine producers has steadily increased in the period under review. In 2009/2010, there were only 21, while in 2021/2022, there were already 380. This suggests that more and more people and businesses are interested in wine production in Poland. The area under vines (in hectares) is also increasing year on year. In 2009/2010, it was 36.01 ha, and in 2021/2022, it will reach 619.42 ha. The number of producers and the area under cultivation is also increasing, translating into a significant increase in wine production. The amount of grapes for winemaking (in quintals) is increasing significantly, reaching 28,496.60 quintals in 2021/2022. The result of the changes taking place is an increase in wine sales. Wine sales, expressed in hectolitres (hl), are growing dynamically over the period under review. In 2010/2011, it amounted to 247.88 hl, and in 2020/2021, it will reach 9 328.17 hl. This is a significant increase, which confirms the increased interest in wine in Poland.

**Table 2.**

*List of wine producers making wine in the wine year 2021/2022 and intending to make wine in the wine year 2023/2024 by province, as of 2023.10.13*

	Voivodship	List of wine producers making wine in the wine year 2021/2022	List of wine producers intending to make wine in the wine year 2023/2024
1.	Małopolskie	72	78
2.	Lubuskie	46	58
3.	Dolnośląskie	40	54
4.	Lubelskie	38	49
5.	Podkarpackie	41	47
6.	Świętokrzyskie	24	35
7.	Wielkopolskie	18	26
8.	Śląskie	17	20
9.	Mazowieckie	25	18
10.	Zachodniopomorskie	9	18
11.	Łódzkie	13	16
12.	Opolskie	14	13
13.	Kujawsko-pomorskie	10	13
14.	Pomorskie	6	9
15.	Podlaskie	1	4
16.	Warmińsko-mazurskie	2	3
Suma:		376	461

Source: own compilation based on National Agricultural Support Centre, List of wine producers making wine in the wine year 2021/2022 and intending to make wine in the wine year 2023/2024 (as of 13.10.2023), <https://www.gov.pl/web/kowr/wykazy--rejstry>, accessed on 24.10.2023.

The table above shows the number of wine producers in each province in two different periods: in the 2021/2022 wine year and the 2023/2024 wine year. This shows the dynamics of the development of this industry in Poland, where an increase in the number of wine producers can be seen in the future. The total number of wine producers in all provinces is 376 in the 2021/2022 wine year and rises to 461 in the 2023/2024 wine year, reflecting the growing interest in winemaking in the country.

In addition, the most significant number of producers is in the Małopolskie and Lubuskie provinces. Regions play an important role in Polish winemaking. Most of the voivodships recorded an increase in wine producers between the two years analyzed. This demonstrates the

growing interest in the wine industry at the regional level. There are differences in the intensity of growth, with some voivodships, such as świętokrzyskie, showing a more pronounced increase than others, which suggests that in these regions, winemaking is at a relatively early stage of development and is attracting new producers.

**Table 3.**

*The most extensive vineyards in Poland*

Name of vineyard	Area (ha)	Voivodship
Turnau	34,00	zachodniopomorskie
Samorządowa w Zaborze	33,40	lubuskie
Srebrna Góra	18,50	małopolskie
Charbielin	27,00	opolskie
Jaworek	18,50	dolnośląskie
Dom Bliskowice	11,00	lubelskie
Gostchorze	11,00	lubuskie
Silesian	11,00	dolnośląskie
Aris	10,20	lubuskie
Marcyporęba	10,00	małopolskie
Milsko	10,00	lubuskie

Source: own compilation based on the Enoportal. pl vineyard search engine, <https://www.enoportal.pl/winnice/>, 24.10.2023.

The data analysis in the table above allows several key conclusions. Firstly, the variation in the vineyard area is noticeable. The largest vineyard, Turnau, has a significantly larger area (34 ha) than the others. However, the other vineyards also occupy significant areas, indicating significant viticulture in these regions. Secondly, it should be noted that vineyards are located in various provinces, which illustrates the geographical diversity of wine production in Poland. The largest vineyards are located in the zachodniopomorskie, lubuskie, małopolskie and opolskie voivodships. Thirdly, the Lubuskie Province seems to have a relatively large number of vineyards, with four listed as the largest. This may suggest that it is an essential region for winemaking in Poland. The diversification of provinces and vineyard sizes indicates the diversity of wine producers and varieties in Poland.

## **5. The impact of wine market development on the attractiveness of the region**

Regional attractiveness, as defined, is a complex concept that refers to the ability of a geographical area to attract investment, people, and tourists and to create conditions conducive to economic and social development. The attractiveness of a region is based on several factors, such as infrastructure, resource availability, quality of life, education, culture, public policy, and many other elements that influence the level of investment attraction, population migration, and development of a region (Kotler, 1993; Dwyer, Kim, 2003; Dicken, 2011; Porter, 1998). According to A. Smith (2000), "the attractiveness of a region is the degree



of investment attraction and population migration, based on a combination of economic, social, cultural and environmental factors that influence the region's development".

Thus, regional attractiveness is a concept that refers to the set of characteristics and factors that make an area or region interesting, desirable, and attractive to people, investors, tourists, and businesses. A region's attractiveness can be assessed from different perspectives and encompass many aspects. The key factors that influence a region's overall attractiveness are presented below:

- economy - a strong and sustainable regional economy is often considered a key attractiveness factor. This means the presence of businesses, their generation of jobs, investment opportunities, and the economic stability of businesses and residents;
- education - the presence of reputable schools, universities, and research centers can attract students and professionals and promote innovation and technological development;
- quality of life - a high quality of life, access to healthcare, safety, culture and entertainment, and access to parks and recreational areas can attract residents and tourists;
- infrastructure - good road, rail, port, airport, and telecommunications infrastructure to facilitate transport and communication within the region;
- culture and heritage - a rich cultural offer, monuments, festivals, traditions, and heritage attract art and history lovers and tourists;
- nature - beautiful landscapes, national parks, access to the sea, mountains, etc. can attract nature lovers and tourists;
- cost of living - an acceptable cost of living, including housing, food, health care, and education, can influence the attractiveness of a region;
- safety - high levels of security and low crime rates make a region more attractive to residents and investors;
- access to markets and trade - the geographical location of a region and access to national and international markets can be an important factor for businesses;
- innovation and technological development - the presence of technology companies, technology parks, and innovative clusters can attract entrepreneurs and investors.

It is worth pointing out that the attractiveness of a region is a subjective concept that can vary according to the needs and expectations of different sections of society. For some people, an attractive region is a place with a strong labor market and a growing economy; in contrast, for others, it may be an area with beautiful nature and a rich cultural heritage. In practice, many regions seek to develop and promote their store to become more attractive to different stakeholder groups. In this context, it should also be remembered that the impact of vineyards on the development of a region's attractiveness is also more fragmented than comprehensive. Their impact will be visible in selected areas such as:

- job creation - increased wine production requires more workers in vineyards, wineries, and wine-related industries such as wine tourism. This can create new jobs in the region, increasing the attractiveness for people looking for work;
- wine tourism - wine regions often attract tourists who visit, taste wines, and enjoy the beauty of the surrounding countryside. This can boost tourism and attract both domestic and international visitors, which has a positive positively impacting;
- development of tourism infrastructure - to meet the growing needs of tourists, wine regions can invest in developing tourism infrastructure such as hotels, restaurants, cycle paths, walking routes, and tourist information centers. This, in turn, can make the recenters attractive to visitors;
- increase in the production of local products - winemaking often goes hand in hand with the production of other local products, olive oil, or food products. This can increase the region's attractiveness as a place to taste the region's attractiveness and heritage development;
- culture and heritage development - winemaking can influence the region's culture and heritage development attractive to history and culture enthusiasts;
- impact on property values - wine regions that become more popular can also gain property values. Investors may become interested in buying such regions, which can increase investment attractiveness;
- impact on education and research - the development of winemaking may also influence the development of wine-related research and education. This can attract students and researchers to the region, which in turn leads to job creation and increase the importance of the educational center.

An example of a winery that has had a significant impact on job creation is Kendall-Jackson Vineyard Estates, located in California, USA. Kendall-Jackson is one of the largest wine producers in the Sonoma County region and is known for its innovative winemaking practices. Kendall-Jackson Vineyard Estates demonstrates how large vineyards can create a variety of jobs in different sectors, from agriculture and manufacturing to the areas of tourism, education, food service, and wine-related industries. In this way, the development of a single vineyard can significantly contribute to the creation of jobs throughout the region.

An example of a Polish winery that significantly contributes to the attractiveness of the region is the Trzebnickie Hills Winery, located near Trzebnica, Lower Silesia province. This vineyard attracts tourists both because of its picturesque location and its offer of wine tasting and vineyard tours. This contributes to increased interest in the region and generates tourist traffic. It regularly hosts a variety of cultural events, such as concerts, festivals, and fairs of local products. These events attract not only wine lovers but also the general public, increasing the attractiveness of the region. The winery cooperates with local producers and businesses, which promotes the development of the local economy. The Trzebnica Hills winery

also engages in wine education, offering workshops and training for those interested in the subject. This contributes to raising consumer awareness of local wine, in addition to engaging in sustainable development practices, which increases the region's attractiveness among those interested in ecology.

## 6. Conclusions

The author's analysis of the literature on the subject was intended to answer whether and in which areas/aspects the development of the wine market in Poland affects the attractiveness of regions.

Currently, the wine market in Poland is experiencing dynamic development, which has a positive impact on the attractiveness of regions in the country. This article analyses the potential impact of this development on the regions. In recent years, Poland has become a significant wine producer, which attracts investment and develops local economies. The noticeable increase in the quality of Polish wines makes wine regions more competitive on the international market, increasing the production and quality of Polish wines.

In addition, the increased interest in Polish wines contributes to the development of oenotourism, which boosts tourist traffic in wine-growing regions. In turn, wine regions are becoming attractive tourist destinations, which benefits local entrepreneurs, hotels, restaurants, and other service providers.

Winemaking also helps to promote local cultural heritage and traditions, which enriches the identity of the regions. Wine festivals and wine-related cultural events attract the attention of tourists and locals, supporting the development of local culture and regional heritage.

In addition, the growth of the wine market is also encouraging the development of the catering sector, favoring local food producers and restaurants. New partnerships are being formed between winemakers and restaurateurs, which supports the growth of the catering industry in wine regions.

The growth of the wine market also encourages investment in viticulture, which can contribute to sustainable agricultural development. Winemaking can and often does support ecology through organic farming practices and preserving natural areas.

The development of the wine market in Poland has a positive impact on the attractiveness of regions. It contributes to the growth of wine production, promotes local culture and heritage, develops gastronomy, supports sustainable agricultural development, and develops the tourism sector. It is also worth remembering that with the growing demand for products of unique value, it can be forecast that wine tourism may be one of the opportunities contributing to the development of the local tourism industry and increasing the attractiveness of regions.

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