

Main Aspects of the Development of Enotourism in Uzbekistan

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Abstract: Wine tourism is a special type of tourism, recreation and travel, which includes tasting, buying wine, right at the place of its production. this article presents the results of a study in the field of enotourism. The author analyzes the state of both domestic and world viticulture, as well as the place and role of viticulture in the development of enotourism.

Key Words: winemaking, vineyard varieties, enotourism, viticulture subsidies, intensive development of viticulture, vineyard sown areas.

Introduction. With the development of winemaking, interest in this industry is growing rapidly. At a rapid pace, wine lovers increasingly prefer to understand not only grape varieties, but also in what conditions they grow, how they are cared for and how the wine production process works. It is important to note such a basic law of economics, there is a demand - there is a supply. This is how wine tourism, or enotourism, appeared. The direction is quite young, the history of its occurrence varies from region to region, but in general we are talking about the early 2000s. In simple terms: a wine tour is a tour that is organized for everyone to visit one or more wineries. The standard program includes a tour of the vineyards, an introduction to the production process, a tour of the wine cellars, and then, most importantly, a tasting. Many winemakers offer additional entertainment for tourists. If you travel in autumn, you will have the opportunity to take part in the grape harvest or try to crush it with your feet. There are gastro tours that include acquaintance with the local seasonal cuisine. Large winemakers rent guest houses as a hotel and can accommodate you for a night or two. Another pleasant side of such tours is getting to know people who create wine with their own hands, as well as with the culture of the region. Of course, the main goal of such tours is to buy the wine you like directly from the manufacturer. For many wineries, these sales amount to 20-30% of the annual volume. Currently, there is a wide range of wine tours on the market: individual, group, corporate, tours for a few hours, for a full day or for several days. This type of tourism is interesting both for wine lovers and professionals who travel the world to exchange experiences. Since enotourism is actively developing, it is currently problematic to estimate the total volume of this market in the world, but you can focus on data for individual countries. For example, in Italy, wine tourism generates 2.5 billion euros per year. In Germany, this type of holiday attracts 50 million people annually, who spend 5.5 billion euros on travel. In the US, 27 million travelers go for food and wine tastings.

Methods. In preparing this article, such methods as observation and collection of facts, the method of scientific abstractions, horizontal and vertical analysis, a systematic approach, induction and deduction, and a graphical method were used.

Results. During the years of the formation of the independent Republic of Uzbekistan, state protectionism and strict currency regulation led to a reduction in the number of importers and the volume of imports, unjustifiably high prices for imported wines. In combination with the lack of a domestic product, this has led to a long-term impoverishment of the wine assortment. As a result, the “wine consumer” has practically disappeared in the country. The average consumption of wine products by the average number of older and middle generations has decreased significantly. According to the official report of the Agency for the Regulation of the Alcohol and Tobacco Market and the Development of Winemaking, as of 2020, the utilization rate of existing capacities in the production of grape wines is about 44%. According to the same report, in 2020, 20 million liters of wine and 130 million liters of alcoholic beverages and cognac, 67 million liters of food alcohol, 232 million liters of beer were produced.

The situation in technical viticulture has similar roots: the destruction of connections that worked in Soviet times, isolation, and displacement by more profitable industries. The terroir features of the region also play their role. Uzbekistan is a country free from phylloxera. And today it does not simplify, but complicates the survival and development of the industry. State measures to preserve this status slow down the work with new varieties and the process of creating vineyards. Planting material can officially be imported only "in vitro" and spend an additional three years before receiving a seedling.

In Uzbekistan, both drip irrigation (up to +60°C in summer) and shelter viticulture (up to -20°C in winter in mountainous areas, late return frosts in spring). Creation and maintenance of new vineyards requires serious financial investments.

Given all this, as well as the low yield and purchase price of technical grapes, it is much more profitable for farmers - about 25 times in terms of income per hectare - to grow table grapes.

As a result, as of the beginning of 2020, there were only about 15,000 hectares of industrial varieties in Uzbekistan. The varietal composition is variegated: there are international varieties, Soviet selection, autochthons, but systematic work on the selection and reproduction of optimal varieties in the country has not yet been carried out. Today, grapes are grown on an area of 90,000 hectares in the country. 900 thousand people are employed in this area on a permanent and seasonal basis. Over the past four years, 52,000 hectares of new vineyards have been planted, and 210 billion soums have been allocated to the sector in the form of subsidies. During this period, the share of grapes in the export of fruits and vegetables doubled.

At the same time, market demand analysis reveals huge untapped opportunities. In particular, in terms of sales, grapes rank third among fruits in the world market, and demand for it is growing by an average of 350 million dollars annually. Uzbekistan's grape export potential is estimated at at least \$600 million, raisins at \$500 million, and wine at \$100 million. Viticulture has a high economic and social effect. Thus, an average of 100 million soums is spent on growing table grapes on 1 hectare of land and in 4 years it can bring a net profit of 250 million soums. Grape seed oil is also highly valued in the world market.

Another important aspect is that 1 hectare of vineyards, especially of the trellis type, can provide employment for up to 10 people, produce products worth 300 million soums and export products for an average of 25 thousand dollars, while 1 hectare of grain crops provides employment 2 people and produces products for a maximum of 20 million soums.

These comparative facts confirm the need for greater attention to viticulture and the solution of existing problematic issues in the field.

Unfortunately, in some areas the area of large vineyards has decreased by 7,000 hectares over the past four years. Breeding work in the sphere is practically not carried out, grape varieties created 40-50 years ago are grown. There is no system of incentives for the renewal of vineyards. The science and technology of growing vines is not respected, neither scientists nor growers are engaged in the elimination of diseases. Consequently, productivity decreases, more and more vineyards fall ill. Only 38 percent of the vineyards are grown using the intensive method. The yield of local grapes is 1.5-2 times lower than in other Asian countries. In addition, 90 percent of the grapes grown in our country are stone fruits, while there is a growing demand for seedless grapes around the world.

The level of grape processing also does not meet modern requirements. The share of wine in the total consumption of alcoholic beverages is only 2 percent.

Enotourism, that is, wine tourism, is poorly developed in the country. Only four tourist plantations have been organized in Samarkand, Fergana and Tashkent regions. In this regard, the issues of wide development of viticulture were discussed at the meeting. The need was noted, first of all, to organize large vineyards in the foothill areas. So, last year, due to the reduction of grain areas in the Altyaryk region, large vineyards were planted on 2,000 hectares. They provide jobs for 5,000 residents of the district.

Most importantly, this will make it possible to harvest an additional 60 thousand tons of grapes, to ensure the export of products worth almost \$100 million next year and \$200 million in subsequent years after reaching full capacity.

New vineyards have also been created in Farish, Gallyaaral, Yangiabad, Chirakchi, Payaryk and Koshrabota regions. At the meeting, the task was set to create, based on this experience, new export-oriented plantations in 44 districts of Karakalpakstan and regions. The head of state stressed the importance of creating infrastructure to service these plantations. To this end, project offices for the development of viticulture, provision of seedlings and protection against diseases will be organized in the territorial divisions of the Ministry of Agriculture.

Cultivation of certified grape seedlings will be deployed on the lands of the Research Institute of Horticulture, Viticulture and Winemaking named after academician Makhmud Mirzaev and other scientific institutions. In order to stimulate the creation of new and renewal of old vineyards, subsidies in the amount of 10 million soums will be provided for each hectare of new certified plantations.

To finance the laying of vineyards, banks will be allocated resources in the amount of \$100 million.

Homestead lands play an important role in the development of the sphere. For example, households in Bulakbashi district grow 5,000 tons of grapes, which brings in 15 billion soums of income.

The President stressed the need to popularize this experience in all regions and expand the practice of growing grapes along the perimeter of household plots and along roads.

The meeting discussed issues of wide introduction of scientific achievements and innovations in the sphere. The Ministry of Innovative Development was instructed to create new high-yielding, boneless, cold-resistant and disease-resistant grape varieties based on foreign experience.

It is indicated that it is possible to increase the yield by 2-3 times by growing grapes on trellises. To popularize this method, up to 30 percent of the costs for the construction of tapestries will be compensated

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from the budget. In addition, the import of equipment and machinery used in viticulture will be exempt from customs duties.

The head of state stressed the need to create wine clusters to create a full cycle of grape processing and production of finished products.

Such clusters will be provided with incentives for the purchase of processing equipment, drying and packaging of grapes. It is also determined that the excise tax on natural wines will be abolished.

During the analysis of the export potential of the industry, it was noted that this year it is possible to increase the export of table grapes to \$200 million, raisins - \$130 million, and the export of natural wines - up to \$50 million.

They also discussed measures to create the necessary infrastructure for enotourism.

Deputy Prime Ministers, ministers and khokims reported on the issues discussed at the meeting.

Analyses. Wine production in Uzbekistan decreased in 2019 in physical volume by 14.8 percent compared to 2018 to 20.1 million liters, in value terms, taking into account the devaluation of the national currency, by 12 percent to 146.4 billion soums.

Wine consumption around the world

million glalon

№		2017	2018	2019	2020	2021
1	USA	30,8	30,6	30,9	31,7	32,6
2	France	27,8	27,5	27,3	27,1	27
3	Germany	20,4	20,3	19,6	20,1	20,3
4	Italy	20,8	19,5	21,4	22,4	22,6
5	China	16,5	15,5	16,2	17,3	19,9
6	England	12,7	12,6	12,7	12,9	12,7

In particular, the production of natural grape wine decreased over the reporting period in physical terms by 15.6 percent to 19.3 million liters, sparkling wine ("Champagne") - increased by 11.6 percent to 769.8 thousand liters.

Currently, about 60 enterprises are engaged in the production of wine in Uzbekistan. The largest of them JSC "Tashkent Wine Plant" was founded in 1867. It includes four factories with a total capacity of 7.8 million decaliters of 35 brands of wine, 16 brandy and 107 vodka.

In addition, the plant owns a plant for the production of rectified alcohol with a capacity of 2 million decaliters per year, a glass factory with a capacity of 200 million bottles per year, 4 thousand hectares of vineyards and orchards, as well as points for the primary processing of grapes with a capacity of 35 thousand tons per year.

Recall that since April 2019, Uzbekistan has allowed the sale of wine and beer in any stores, catering points and hotels without a permit for the right to sell alcoholic beverages. This requirement was introduced from January 1, 2007. The new rules do not apply to strong alcoholic beverages.

While the emphasis is on the development of winemaking and the development of enotourism in our country, it is important to emphasize the world experience in the development of winemaking. In this regard, special emphasis should be placed on the volume of wine consumption in the developed countries of the world. Таблица 1.

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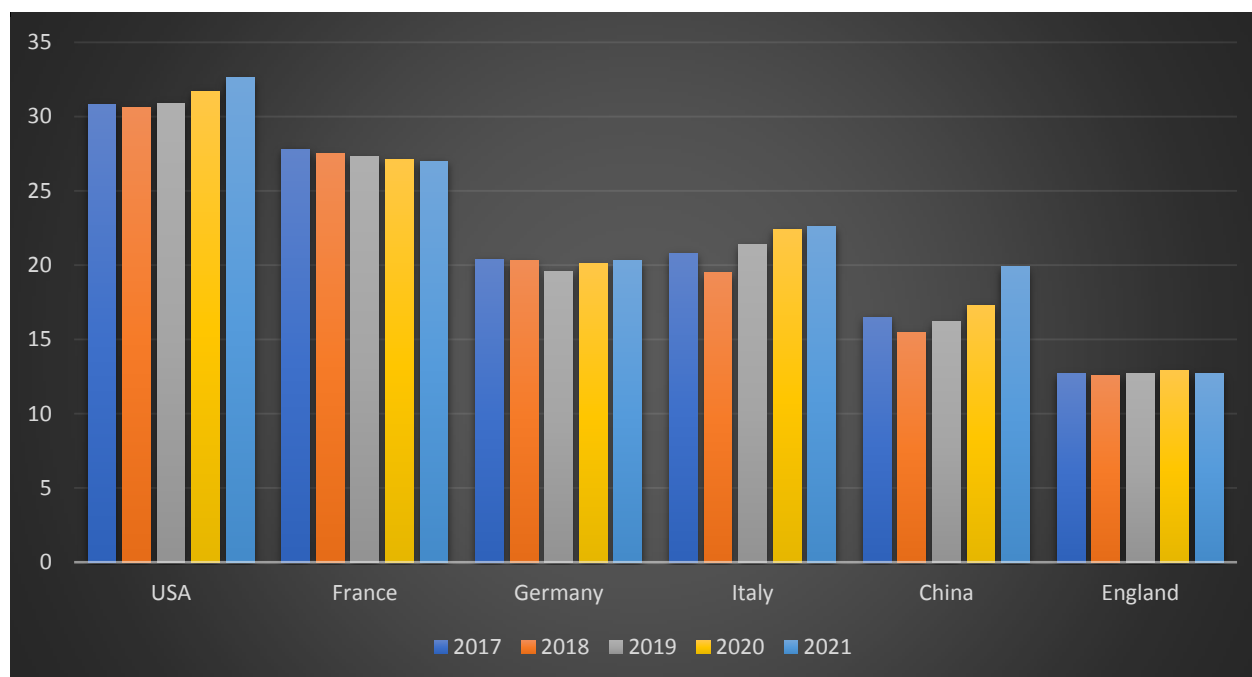


Figure 1. Wine consumption around the world

The data in Table 1 show that the United States is the absolute leader in wine consumption in the world. Wine consumption in the United States has shown significant growth in recent years, although there is a slight decline of 0.2 million gallons in 2018. The USA is one of the largest wine producers in the world. Today, almost all 50 states produce them. The key role in American winemaking is undoubtedly played by California, where 90% of all wines in the country are produced. The states of Oregon and Washington have also gained worldwide fame, while wines from New York are now popular in the United States.

From the data in the table, it can be noted that France is also one of the leaders in wine consumption, on average 27.1 million gallons of wine are consumed per year in this country, which also provides France with leadership in the production and consumption of wine.

Discussion.

So, today Uzbek winemaking is at the beginning of the path of restoring the industry to a new qualitative level.

All components of the terroir: climatic, soil, landscape conditions, hard work of people and centuries-old traditions of viticulture - allow the construction of full-cycle wineries - from the vine to the bottle - and the creation of a high quality product.

The level of state support, the speed of decision-making in this area significantly exceeds Russian ones:

- Since January 2019, wine has been recognized as an agricultural product. Substantial subsidies to the industry have been launched.
- In 2020, the Agency was created, which has at its disposal funds from 5% of the turnover of alcoholic products, mainly vodka and other strong alcohol.
- From 2020, the Agency covers all costs of producers for the participation of wineries of the republic in exhibitions and competitions.
- Since January 2021, the licensing of wine production has been cancelled.

- From July 2021, there are no import duties on equipment, barrels, planting material.
- Since August 2021, the volume and directions of subsidies have been increased.
- The Agency is actively involved in the preparation of projects for the creation of joint ventures for the production of oak barrels, fermentation tanks, bottles, caps.
- From January 2022 – wine excises will be abolished.
- Five-year planning: in the plan for 2021 to produce 26 million liters of wine, and by 2026 to increase production to 117 million liters.

The most significant support is received by projects for the creation and reconstruction of technical vineyards, the installation of artesian wells and the introduction of drip irrigation:

— in 2020, subsidies in the amount of \$4.8 million were allocated from the Agency's Viticulture Development Fund for the creation of 115 artesian wells and the introduction of drip irrigation on a total area of 4.2 thousand hectares.

In 2021, it is planned to create new vineyards on a total area of 40 thousand hectares, it is planned to install drip irrigation systems using 1,008 artesian wells on 16 thousand hectares. About \$5 million in subsidies and a comparable amount of concessional loans have been allocated to implement these tasks.

Uzbekistan is a large country, wine regions are remote from each other. Nevertheless, we managed to visit iconic enterprises in three regions and meet with representatives of the fourth.

Surprisingly, these meetings on the land of Uzbekistan embodied all the types and scenarios known to me from Russian winemaking and my favorite ones.

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