SCIENTIFIC APPROACH TO THE STRATEGY OF THE VINE & WINE SECTOR WITH SPECIAL REGARD TO THE MÁTRAALJA WINE REGION

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SUMMARY

The essential objects of the present study are the description of the strategic aspects of the vine & wine sector and the detailed analysis of the Mátraalja wine region (MWR), which is Hungary s largest mountain-slope wine growing area.

A questionnaire assessment served as a basis for the study, within the framework of which the managers of MWR wine confraternities were asked questions about the parameters of their respective wine confraternities, and their opinions of the present situation of the latter, along with the possibilities of developing them.

Further issues examined were: the required development of infrastructure, including the inadequate wine-processing, storage and bottling capacities, their qualitative and quantitative characteristics, and the possibilities of establishing them; the establishment of an advisory system to serve vine growers' interests; the possibilities of establishing a regional plant protection and weather forecast system, and its prospective effects on profitability and environmental protection.

Finally, the structure of grape varieties, the aspects of creating a potential leading wine and of its marketing, the establishment of competitive wineries, the implementation of a system of trade and logistics based on Internet, and the effective realisation of marketing coordinated by the MWR Wine Commercial House were examined.

The present study does not contain all tables and charts compiled by the authors but draws conclusions from them.

ACKNOWLEDGEMENTS

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1. THE MÁTRAALJA WINE REGION (MWR)

MWR, the largest mountain-slope vine growing area in Hungary, is situated on the southern slopes of the Mátra mountains. It includes, in addition to 22 settlements of Heves county, the settlements Vác, Mogyoród, Rákosliget-Királydomb and Rózsahegy-Báróhegy situated in Pest county, and Pásztó situated in Nógrád county.

On the basis of information received from the wine confraternities, in 2002 there were 13 428 registered vine growers in MWR.

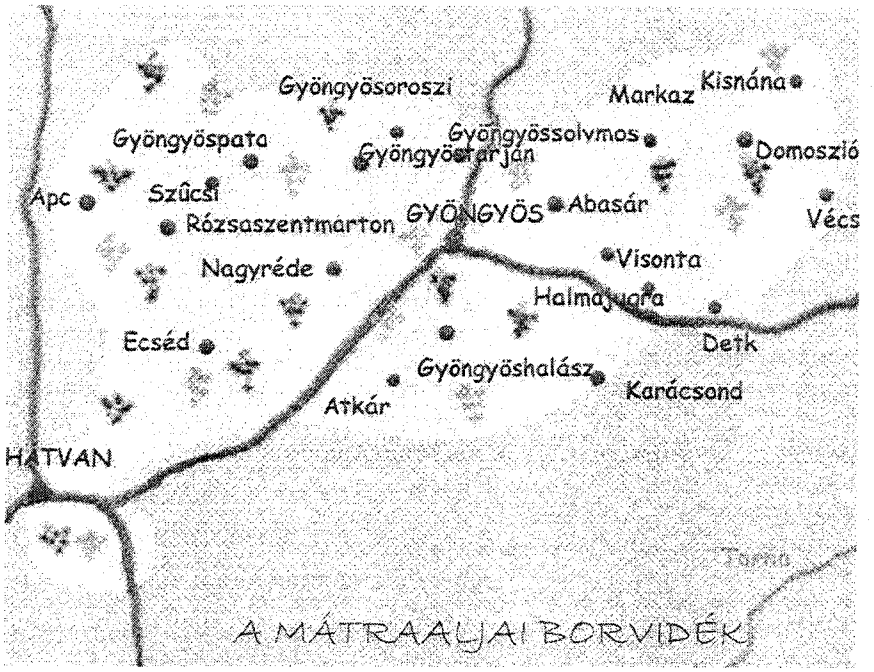
MWR has a favourable orographical location, climatic and soil conditions, which provide optimal chances for growing both white and red wine grape

varieties, along with table grape varieties for direct consumption.

In 2002 the total vine area in MWR amounted to 8 052 ha, and the total potential area of vine growing (as listed in the vine cadastre) to 22 000. After the Kunság Wine Region, the second largest volume of grapes is harvested in MWR.

Figure 1.

The area of MWR situated in Heves county



2. MAIN FIGURES OF VINE GROWING IN HUNGARY IN 2002

According to the data of the Hungarian Central Statistical Office (HCSO), in 2002 the total area of vineyards Hungary amounted to 92 842 ha, of which 22.6 %, i. e. 20 958 ha, were situated in the Northern Hungarian Region. Within this area the MWR occupied 8 052 ha, which constitute 8.7 % of the total vine growing area of Hungary. (Note: four wine regions can be found in the Northern Hungarian Region, namely the Mátraalja wine region, the Eger wine region, the Bükkalja wine region, and the Tokaj wine region.)

The total vintage in Hungary amounted to 501 499 t (i. e. by 38% less than in the previous year), of which 23 207 t (4.62 %) were consumed directly as table grapes. As for the Northern Hungarian Region, the total vintage amounted to 126 248 t, of which 3299 t were used for own consumption. The analogous figures for MWR were 49 739 and 1469 t, respectively.

Table 1.

Main figures of vine growing in 2002

Region	Area (ha)			Production (t)			Average grape yield (kg/ha)	Wine production (hl)
	Total	Bearing	Percentage	From the total area	From the bearing area	Percentage		
Hungary	92.847	82.846	89,2	501.499	476.160	94,9	5.750	3.332.970
Northern Hungarian Region	20.958	19.651	93,8	126.248	117731	93,3	5.990	847.951
Mátraalja wine region	8.052	7.439	92,4	49.739	-	-	6.177	348.173

Source: HCSO and own research data. (Note: As regards MWR, no data about the grape production in terms of the bearing area are available. Therefore the total area was taken as a basis)

In Hungary the average size of vineyards per vine grower is 0.32 ha. In the Northern Hungarian Region this figure is 0.45 ha on the average, ranging between 0.65 and 0.25 ha.

Within the Northern Hungarian Region, Heves County has the largest average size of vineyards with 1,44 ha, whereas in Borsod-Abaúj-Zemplén and Nógrád counties the average size of vineyards is below 0.25 and 0.17 ha, respectively, due to their less favourable orographical conditions.

In MWR a vine grower produces grapes on an area of 0.6 ha on the average. The majority (77%) of the 13 428 vine growers has a vineyard of 0.15-1 ha.

Vine growing in MWR faces some serious problems needing urgent solution. Whereas there are rich vine growing traditions, favourable climatic and soil conditions, on the one hand, the vineyards are scattered, and a lot of small-sized vineyards are owned by a great number of vine growers, on the other hand. There are enormous differences in vine growing technology, skills and marketing know-how. MWR has no leading wine which could identify it.

In MWR there are some larger wine producing companies well representing this vine growing area, whereas the production of premium-quality wine by petty vine growers is still missing. This is a consequence of the lack of co-operation, capital, skills and marketing know-how. This gap can be only eliminated by means of co-operation.

3. THE STRATEGY OF MODERNISATION IN MWR

The target of the strategy of modernisation in MWR is the production of premium-quality products manufactured using modern vine growing technologies and backed by quality control. This activity should be promoted by effective marketing.

The strategy of modernisation has several objectives as follows.

Finding a leading wine

Hungary, and within it MWR, is situated at the northern border of wine production. Only areas listed in the so-called wine cadastre can be used for wine production. The conditions of the Hungarian mountain-slope wine regions are more suitable for the production of

special wines than of ordinary bulk wines. However, wine specialties can be successfully produced only if environmental conditions, grape varieties, vine growing and wine making technologies have an optimal interrelation to each other.

However, MWR has no leading wine like Bull's blood in the Eger wine region, Tokay aszu in the Tokaj wine region, Blaustengler in the Badacsony wine region, and Juhfark in the Somló wine region.

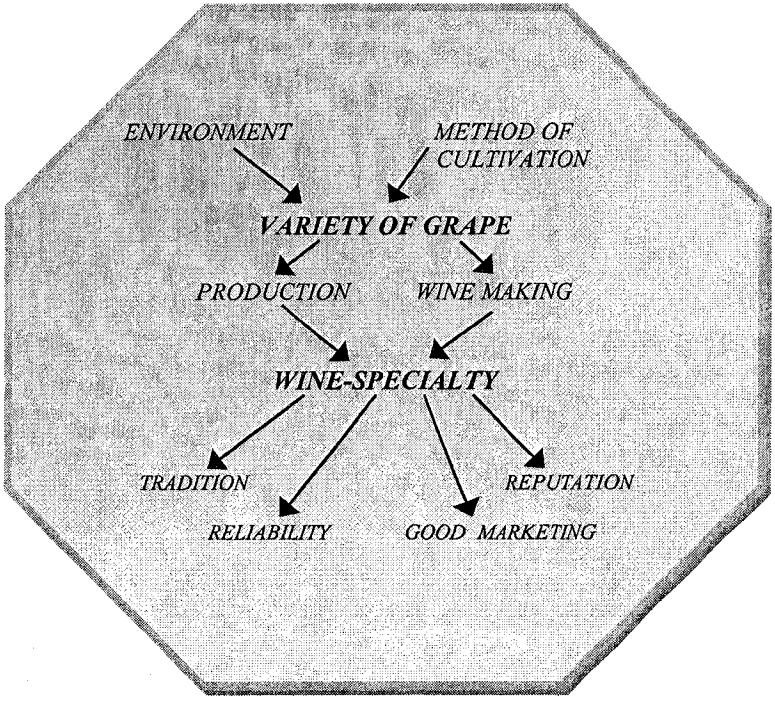
Therefore, first things first, a premium-quality wine capable of playing the role of the leading wine and constituting the "image" of MWR must be found

The procedure of finding the leading wine was part of the authors' research, but the detailed presentation of methods employed for this purpose is beyond the limits of the present study. Anyway, it has to be emphasised that effective and non-stop marketing constitutes the primary criterion of methods related to the establishment, introduction and acceptance of a leading wine.

MWR vine growers prefer such white wine grape varieties as Müller-Thurgau (957 ha), Muscat Ottonel (544 ha), Welschriesling (536 ha), Chardonnay (483 ha), and Pinot gris. Among table grape varieties vine growers produce Chasselas in larger volume. Popular varieties of red wine grapes are Blaufränkisch, Kékoportó, and Zweigelt. It is worth wile choosing one of these varieties the potential leading wine, but it can be prophesised that a white wine grape variety will be the leading wine because of the old traditions of growing these varieties.

Figure 2.

Production of wine specialties and conditions of marketing



Wine specialties should be special original products with marked characteristics. In order to maintain the reputation of a given wine region, it is necessary that special wines be produced every year in a large quantity and at a high quality.

Beside the problem of a uniform image of their produce on the market, wine regions in Hungary, including MWR, have also another problem: there are a lot of scattered small-sized vineyards owned by a great number of vine growers, in consequence of which the total area of vineyards is divided up into small plots. If a significant chain store ordered any special wine from Hungary in a large quantity (from one wine region and from a given vintage), nobody could fulfil its order. If this large quantity were "collected" from several wine regions, it would be only a cheap bulk wine for mass consumption instead of a premium-quality product. In France there are 920 000 ha of vineyards, whereas in Hungary the total area of vineyards amounts only to 93 000 ha; in France there are 10 vine growing regions, whereas in Hungary there are 22; the single Bordeaux vine growing region with its area of 95 000 ha is bigger than all Hungarian wine regions together; even the Loire wine region of Loire has an area of 60 000 ha. The Spanish vine growing regions are even bigger in general. In France, Italy, Australia and South Africa one grape variety is grown per one wine region, so every vine growing area has a typical wine which represents it. However, MWR has no typical wine so far as mentioned above. Therefore the most important task is to find a leading wine and at the same time the right market niche of potential customers in terms of national and international market.

Establishment of co-operative wineries

The right way for the future is the creation of wine regions having a uniform image. The wines of the MWR can be competitive on national and international markets only if new organisations based on the co-operation of vine growers will be established. The primary organisational conditions of the modernisation of MWR are the establishment and effective functioning of vine growers' co-operations and producer-owned wine commercial houses.

As the authors' investigations and the available data show, MWR vineyards are very small and scattered. The vine growers produce grape using different training systems and vine growing technologies. A huge variation can be observed in the conditions of wine cellars. In order to create the uniform image of the region production, processing and marketing have to be well organised under strict quality control. It is worth wile establishing co-operative wineries on the basis of a voluntary integration and common interest of vine growers.

As regards the size of wineries the following suggestions ought to be taken into consideration.

On a market of a capacity above 100 000 hl of wine selling at low or medium prices Hungarian wineries are well represented. Wineries with capacities of about 30 000 hl of premium-quality wine selling at medium or high prices are represented by 3 wineries in MWR, but it is necessary to establish in addition at least another three ones. The establishment and operation of these wineries owned by the vine growers' organisation may improve the international position and image of wines made in MWR.

In MWR the companies Szőlőskert and Danubiana have capacities over 100 000 hl each, and the companies Solybor, Euromix and Vinum 93 have capacities over 30 000 hl each.

Plant protection and weather forecast system

To date no effective chemical plant protection is possible without a modern forecast system. The security of vine growing can be increased by the establishment and operation of an effective plant protection and weather forecast system providing plenty of important information for vine growers. There are already some systems of this kind in Hungary. Such a system enables plant protection against diseases and pests to be forecast in due course. It serves for forecasting the main vine diseases (downy mildew, powdery mildew, grey rot) indicating the need and time of their control.

Weather forecast stations record the temperature, wind, and atmospheric pressure, of which they inform the vine growers, thus adding to the security of vine growing.

Marketing

The primary prerequisite of the strategy of modernisation is a non-stop effective marketing. There is no chance of success without taking indications coming from the market into account. In the long term MWR premium-quality wines can be sold only on a well-established market using an effective marketing strategy.

4. MWR DATA OF 2002

The following tables show the results of the authos' questionnaire assessment. They are characteristic of the present conditions of MWR.

Total and bearing area of vineyards, and their average size per vine grower

According to the results of the assessment in 2002 the total area of vineyards in MWR amounted to 8 052 ha, and the area of bearing vineyards to 7439 ha. There are 13 428 registered vine growers in the wine region.

As Table 2 shows, a vine grower produces grapes on 0.6 ha on the average. The average size of vineyards is greatest in the Rákosliget-Királydomb wine confraternity (1.92 ha) and smallest in the Gyöngyös wine confraternity (0.37 ha).

As for the bearing area, the average size is 0.55 ha per producer. The average bearing area per producer is 0.36 ha in the Gyöngyös wine confraternity and 1.92 ha in the Ecséd wine confraternity.

The majority of vineyards have a size between 0.15 and 1 ha because 77% of vine growers cultivate an area between 0.15 and 1 ha.

Only 13.4 % of the growers have an area exceeding 1 ha. 12% of the growers have an area between 1-5 ha, which is favourable. However, the vineyard area of only one holding exceeds 100 ha, 8 of them have areas between 30-100 ha, 29 between 10-30 ha, and 88 between 5-10 ha each.

In MWR the average size of vineyards, 0.6 ha, is favourable as compared to the national average, 0.32.

The small size of vineyards is not the only problem of grape production. Further main problems are which training systems are used, which grape varieties are produced, etc. In other words, the main problem is if these vineyards can be dealt

with in a uniform way. This problem requires further examination.

All of the facts presented above emphasise the importance of co-operation. It is not necessary to prove that under these bad size conditions vine growers and wine producers can meet the requirements of modern national and international markets only in case of a voluntary vertical and horizontal integration.

Table 2.

Total and bearing area of MWR, and the number of vine growers (2002)

No.	Wine confraternity (WC)	Total area		Bearing area		Number of vine growers		Total area per vine grower	Berating area per vine grower
		ha	%	ha	%	capita	%	ha	ha
1.	Abasár WC	442.80	5.50	362.60	4.87	979	7.29	0.45	0.37
2.	Atkár WC	416.70	5.17	409.90	5.51	805	5.99	0.52	0.51
3.	Detk WC	30.28	0.38	29.77	0.40	80	0.60	0.38	0.37
4.	Domoszló WC	109.70	1.36	100.00	1.34	274	2.04	0.40	0.36
5.	Ecséd WC	465.00	5.77	424.00	5.70	634	4.72	0.73	0.67
6.	Gyöngyöshalász WC	309.00	3.84	298.00	4.01	629	4.68	0.49	0.47
7.	Gyöngyös WC	263.00	3.27	257.00	3.45	719	5.35	0.37	0.36
8.	Gyöngyöspata WC	533.97	6.63	509.61	6.85	736	5.48	0.73	0.69
9.	Solymos WC	679.00	8.43	598.00	8.04	720	5.36	0.94	0.83
10.	Gyöngyöstarján WC	471.32	5.85	438.01	5.89	781	5.82	0.60	0.56
11.	Halmajugra WC	67.00	0.83	67.00	0.90	165	1.23	0.41	0.41
12.	Hatvan WC	228.48	2.84	185.25	2.49	345	2.57	0.66	0.54
13.	Karácsond WC	307.21	3.82	298.73	4.2	529	3.94	0.58	0.56
14.	Markaz WC	336.00	4.17	300.00	4.3	685	5.10	0.49	0.44
15.	Nagyréde WC	994.00	12.34	919.00	12.5	1 100	8.19	0.90	0.84
16.	Rózsaszentmárt-Apc WC	70.78	0.88	64.78	0.7	164	1.22	0.43	0.40
17.	Szücsi WC	213.50	2.65	203.50	2.4	408	3.04	0.52	0.50
18.	Vécs-Kisnána WC	189.40	2.35	181.50	2.4	417	3.11	0.45	0.44
19.	Visonta WC	580.03	7.20	552.12	7.2	1 054	7.85	0.55	0.52
20.	Gyöngyösoroszi WC	255.09	3.17	240.45	3.3	614	4.57	0.42	0.39
21.	Rákosliget-Királydomb	96.10	1.19	96.10	1.9	50	0.37	1.92	1.92
23.	Rózsahegy and Báróhegy	540.00	6.71	450.00	6.5	1 000	7.45	0.54	0.45
24.	Vác WC	112.00	1.39	112.00	1.1	70	0.52	1.60	1.60
25.	Mogyoród WC	182.00	2.26	182.00	2.5	220	1.64	0.83	0.83
26.	Mátraalja Pásztó WC	160.00	1.99	160.00	2.5	250	1.86	0.64	0.64
Total		**8 052.36**	**100.00**	**7 439.32**	**10.000**	**13 428**	**100.00**	**0.60**	**0.55**

Grape varieties grown in MWR, distribution according training systems and age groups

Grape varieties grown in MWR. In MWR Müller-Thurgau is produced on the largest area (956.8 ha). This grape variety covers 12.9 % of the total area of bearing vineyards. The second is the Chasselas with 715 ha and a percentage of 9.6 %, followed by Muscat Ottonel (544.4 ha and 7.3%, respectively), Welschriesling (535.6 ha and 7.2%, respectively), and Chardonnay (483.1 ha and 6.5%, respectively.

Table 3.

Main grape varieties grown in MWR in 2002

No.	Grape variety	Area (ha)
1.	Müller-Thurgau	956.8
2.	Chasselas	715.0
3.	Muscat Ottonel	544.4
4.	Welschriesling	535.6
5.	Chardonnay	483.1

Distribution according to training systems. An analysis of the training systems used in MWR showed the following results.

Here, the Lenz–Moser training system is most significant. It is used on 4 363 ha out of the total 8 052 ha, thus having a percentage of 54,18%. The curtain training system is typical too having been employed on 1 599 ha in 2002, which means a percentage of 19.9 % share. Next is the umbrella training system having a percentage of 19.9% and covering 956 ha. The wine-stock training system, which requires enormous manual labour and is very sensitive to frost, is only typical in case of old vineyards and amounts only to a few per cent.

Distribution according to age groups. Five vineyards age groups were identified to start with. In 2002, the percentage of the 0-4-year age group amounted to 5.9 %, and that of the 5-20-year age group to 46.8%. However, a higher percentage of these two age groups would be desirable. In consequence of the reduction in the renewal of vineyards during the eighties and nineties of the previous century the percentage of the 21-30-year age group is higher than desirable.

As for the high percentage of the age group over 31 years (14,41%), it is a disadvantage in respect of both productivity and plant protection. This problem takes place particularly in the Rózsahegy-Báróhegy wine confraternity, where 64.8 % of all vine stocks are older than forty. In the Gyöngyöshalászi wine confraternity the percentage of this age group is 22.65%. As for the 31-40-year age group, its percentage is highest in the Solymos wine confraternity, followed by the Gyöngyös and Hatvan wine confraternities.

On the other hand, the area of the 0-4-year age group is greatest in the Nagyréde wine confraternity (75 ha) followed by the Solymos and Abasár wine confraternities (71 and 55.41 ha, respectively). However, there is a difference in respect of the percentage of the area of 0-4-year-old

vineyards within the total vine growing area. In this respect the Abasár wine confraternity has the greatest percentage (12.5%), followed by the Solymos and Nagyréde wine confraternities (10.5 and 7.6%, respectively).

When analysing the distribution of vineyards among age groups in different areas, attention has to be paid to the circumstance whether age groups are represented in a more or less uniform percentage, or whether there are also new plantations in areas where the percentage of vineyards in the age groups of 31-40 years and above is high.

Table 4.

Percentage of age groups in MWR in 2002

Age group (year)	Area (ha)	Percentage (%)
0-4	475	5.9
5-20	3755	46.8
21-30	2624	32.7
31-40	695	8.7
41-	473	5.9
Total	8022*	100

*We haven't got any Information of the distribution of vineyards according to age groups in the Detk wine confraternity is missing

Yields, proportion of own consumption, purchase prices in MWR

Total production and average yield. Table 5 shows the total volume of grapes harvested in MWR during the 3 years 2000, 2001 and 2002. In 2002 the average yield related to the bearing area amounted to 6.17 t. In 2001 the analogous figure was 9.10 t per ha (which is considered the upper limit for the production of premium-quality wine), and in 2000 7.7 t per ha.

In comparison with the national data of the same 3 years, the total yield and average yield were the following (data rounded up).

Table 5.

Total production and average yield in Hungary and MWR

Area	Total production (t)			Average yield (kg/ha)		
	2000	2001	2002	2000	2001	2002
Hungary	684 000	811 000	501.000	7220	9390	5750
MWR	62 000	73 000	50.000	7700	9100	6177

Source: HCSO

Proportion of own consumption. For the strategy of modernisation, total amount and proportion (percentage) of own consumption were examined. In 2000 the share of own consumption in the total production ranged between 0 and 18.3 % within MWR. The Vác wine confraternity represented the largest percentage of own consumption (18.3%) followed by the Gyöngyös and Ecséd wine confraternities (14.6 and 12.9%, respectively).

In 2002 own consumption was highest in the Rózsasazentmárt-Apc wine confraternity (28.1%) followed by the Domoszló and Gyöngyös wine confraternities (17.6 and 16.2%, respectively).

On national an regional (MWR) level the percentage of own consumption was the following:

Table 6.

Percentage of own consumption of grapes in Hungary and MWR

Area	2000			2001			2002		
	Total production (t)	Own consumption (t)	Percentage (%)	Total production (t)	Own consumption (t)	Percentage (%)	Total production (t)	Own consumption (t)	Percentage (%)
Hungary	684 000	32 000	4.7	811 000	48 000	5.9	501 000	23 000	4.6
Mátraalja Wine Country	63 000	1 900	3	73 000	2 400	3.3	50 000	1 500	3

Source: HCSO and own analysis

Purchase prices. In order to estimate vine growers' income one has to know the purchase prices of grapes. Unfortunately, it has to be stated that the lowest price of table grapes exceeded that of white wine grapes by barely 30%. Great variations in prices are due to the differences not only between grape varieties, training systems and vine growing technologies, but also in the efficiency of marketing activities.

An analysis of the purchase prices of certain grape variety types of (white and red wine grapes, table grapes) showed that there are significant differences among wine confraternities in respect of the lowest and highest prices, the extreme values having been very different both in a given year and between different years.

As for the MWR average prices, it can be stated that in 2000 the average price of white wine grapes fluctuated between 30 and 61 HUF/kg, so the difference amounted to 31 HUF/kg. The analogous figures for 2001 and 2000 were 62-32=30 HUF/kg and 57-32=25 HUF/kg, respectively.

In case of red wine grapes the difference between the highest and lowest producer prices was 39 HUF/kg in 2000. 42 HUF/kg in 2001 and 23 HUF/kg in 2002.

Table 7.

Total production of grapes in the Mátraalja wine region in 2000. 2001, 2002

No.	Wine confraternity (WC)	2000			2001			2002		
		Total production (t)	Own consumption * (t)	Own consumption/Total production (%)	Total production (t)	Own consumption * (t)	Own consumption/Total production (%)	Total production (t)	Own consumption * (t)	Own consumption/Total production (%)
1.	Abasár WC	370.59	0.50	0.13	287.94	0.00	0.00	207.43	10.41	5.02
2.	Atkár WC	4 320.00	0.00	0.00	4 975.00	0.00	0.00	2 835.00	0.00	0.00
3.	Detk WC	x	x	x	x	x	x	x	x	x
4.	Domoszló WC	591.00	45.00	7.61	716.00	113.00	15.78	557.00	98.00	17.59
5.	Ecséd WC	4 497.00	581.00	12.92	4 875.00	832.00	17.07	3 120.00	321.00	10.29
6.	Gyöngyöshalász WC	2 503.00	13.00	0.52	2 978.00	23.00	0.77	1 998.00	20.00	1.00
7.	Gyöngyös WC	2 180.00	319.00	14.63	2 708.00	522.00	19.28	1 979.00	321.00	16.22
8.	Gyöngyöspata WC	3 457.37	0.00	0.00	4 262.38	0.00	0.00	2 814.93	0.00	0.00
9.	Solymos WC	4 561.00	10.00	0.22	5 184.00	11.00	0.21	4 682.00	10.00	0.21
10.	Gyöngyöstarján WC	3 507.00	0.00	0.00	4 572.50	0.00	0.00	3 266.30	0.00	0.00
11.	Halmajugra WC	603.00	8.00	1.33	804.00	10.00	1.24	505.00	6.00	1.19
12.	Hatvan WC	3 811.00	40.52	1.06	1 514.00	30.17	1.99	1 327.00	28.58	2.15
13.	Karácsond WC	2 533.14	56.31	2.22	3 568.27	53.70	1.51	2 245.37	43.42	1.93
14.	Markaz WC	231.00	0.00	0.00	305.00	0.00	0.00	191.00	0.00	0.00
15.	Nagyréde WC	10 800.00	12.00	0.11	15 000.00	15.00	0.10	9 300.00	12.00	0.13
16.	Rózsaszentmárt-Apc WC	436.50	52.50	12.03	566.20	135.40	23.91	390.30	109.70	28.11
17.	Szücsi WC	1 563.00	9.00	0.58	1 875.00	10.00	0.53	1 284.00	8.00	0.62
18.	Vécs-Kisnána WC	1 137.00	35.00	3.08	2 128.00	149.00	7.00	1 160.00	120.00	10.34
19.	Visonta WC	6 598.20	3.30	0.05	8 553.00	3.90	0.05	5 087.90	4.20	0.08
20.	Gyöngyösoroszi WC	1 722.00	200.00	11.61	2 062.00	225.00	10.91	1 899.00	182.00	9.58
21.	Rákosliget-Királydomb WC	739.80	3.40	0.46	1 431.40	5.80	0..41	848.40	5.10	0.60
23.	Rózsahegy and Báróhegy WC	1 100.00	10.00	0.91	1 000.00	10.00	1.00	1 200.00	11.00	0.92
24.	Vác WC	2 306.00	421.00	18.26	1 778.00	267.00	15.02	830.00	83.00	10.00
25.	Mogyoród WC	1 490.00	82.00	5.50	1 514.00	13.00	0.86	1 601.00	71.00	4.43
26.	Mátraalja Pásztó WC	920.00	10.00	1.09	630.00	8.00	1.27	410.00	5.00	1.22
	Total	**61 977,61**	**1 911.53**	**3.08**	**73 287.69**	**2 436.97**	**3.33**	**49 738.63**	**1 469.41**	**2.95**

x – data no available

Capacities of wine production, and propagation wood production in MWR

Capacities of wine production. On the basis of information received from the Council of the MWR wine confraternities, in 2002 the total surface of wine cellars was 61 870 m^2 and the total storage capacity 521 806 hl. The greatest part of storage capacities consisted of acid-proof steel containers, followed by traditional wooden barrels.

Conditions and maintenance of cellars show a great variety, but most of them function well, and the qualitative parameters of storage capacities are adequate too.

Unexploited capacities were examined as well. There were unexploited capacities in six wine confraternities. Most of them were located in bankrupt large-scale farms, which got into bad conditions during the last one decade and a half. Only a detailed examination can show if it is worth wile modernising them. No doubt, national economy had a significant loss in last years in this respect.

Propagation wood production. Propagation wood was produced in three wine confraternities (Abasár, Nagyréde, and Rózsaszentmárt-Apc) in 2002. It is mainly the Abasár wine confraternity that is specialised for propagation wood production; here, 56 grape-stock producers grow about 10 million grafts on nearly 100 ha every year. In both of the other two wine confraternities mentioned above, 1 producer in each deals with graft production on 4 and 1 ha, respectively.

Human resources and office equipments of wine confraternities

Abilities and qualification of the management significantly affect the operation of a given wine confraternity. 17 of the 23 wine confraternity presidents, and 16 of their 24 assistants, have a higher qualification, mostly in agriculture 16.

Regarding the equipment of the wine confraternity offices, each of the 25 wine confraternities has a personal computer, but only two of them have Internet access too (2002 figures). This circumstance has to change as soon as possible.

5. OBJECTS OF THE MODERNISATION OF MWR

The main object is, in one sentence, to increase the income of vine growers and improve their living standard by means of competitive wine production. To attain this object a characteristic leading wine has to be identified, including the optimal related conditions of vine growing, wine production, bottling and packaging.

The missing infrastructure has to be completed, which has important environmental aspects beside the improvement of transport (central reservoirs for liquid chemicals, collection stations of pesticide residues).

An advisory system has to be established, which has to promote exclusively the interests of vine growers, and not of suppliers.

A market-oriented structure of different grape varieties and a modern and efficient planting system have to be designed and realised.

A regional plant protection and weather forecast system has be established, which shall provide information for vine growers about predictable plant diseases, pests, insects, and suggest the method of protection in a particular case.

Three new wineries with a total capacity of ca. 30 000 hl, owned by vine growers, have to be established in order to eliminate the existing lack in this field. These new wineries, along with the modernised old ones, must meet EU requirements mainly in terms of wine making technology and cost efficiency. The capacities of the bankrupt large-scale farms can be restructured, if they are capable of modernisation.

The realisation of a supply and marketing system based on Internet is recommendable. Backed by Internet an effective and well-organised system of logistics can be established.

An MWR wine commercial house owned by the vine growers has be established and operated. One of its tasks is the co-ordination of non-stop marketing.

Wine tourism has be operated in a way enabling the advantages of labour available and specialisation to be reali-

sed in order to eliminate the negative effect of domestic competition. At the same time, state institutions have to ask to give a hand in realising programmes of modernisation like the above ones.

When all this comes true, vine growers will be capable of benefiting from production, commerce and services, which will significantly reduce their defencelessness, increase their competitiveness, and increase their profits.

Figure 3 shows the factors and organisations determining the modernisation of MWR.

6. EFFECTS OF THE MODERNISATION OF MWR ON THE VERTICALITY OF THE AGRICULTURAL MARKET

- The vine growers' defencelessness will be reduced, their market relations will improve
- The competitiveness of the sector will significantly increase
- Both vine growers' and investors' risks will decrease
- There will be a balance of demand and supply
- Co-operation will improve
- Complex conditions of the production of wine specialties will be created
- Producers will have equal opportunities regardless of the size of production
- The processing of the production will be more efficient and controllable
- Up-to-date, available and accurate information will be available about the sector
- Current research results will be centrally provided for vine growers, new vine growing technologies and products will be more rapidly implemented in practice
- More effective and integrated marketing will be established, adding to the increase in international competitiveness
- Domestic and international markets will be closely connected with and interrelated to each other

7. THE ECONOMICAL IMPACTS OF THE MODERNISATION OF MWR

- Financial risk will decrease, a predictable financing system will come into being
- Cash-flow position will improve
- The supply and marketing system will operate more profitably and effectively
- Resources will be utilised favourably
- Product quality and its security will improve
- Production, processing and marketing will be more predictable
- Quality of stockpiling will improve
- Costs of supply and marketing will decrease
- A modern system of logistics will enable specific transport costs to be reduced

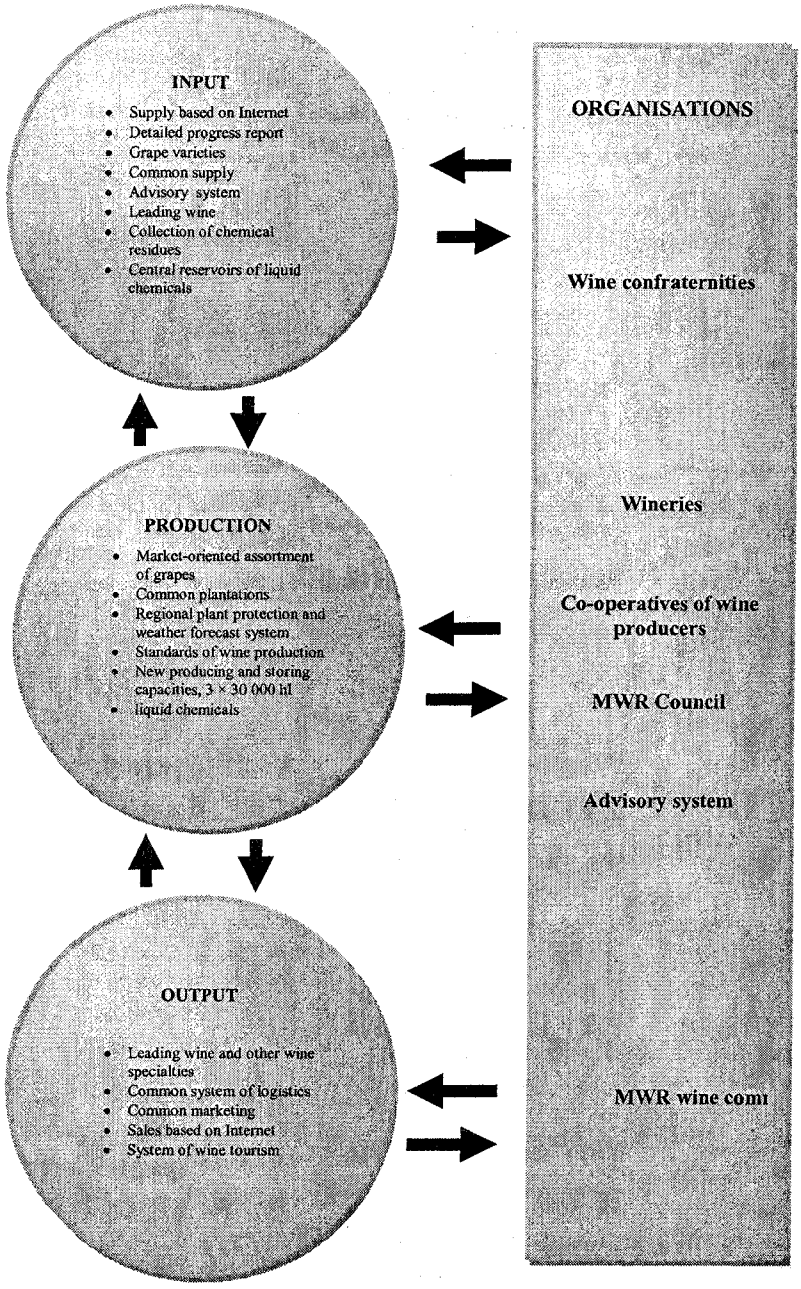
8. THE EXPECTED RESULTS OF THE MODERNISATION OF THE MÁTRALJA WINE REGION IN FIGURES

As a result of the realisation of the project, vine growers' annual income can increase by 1200-1600 million HUF. The elimination of the missing links in the vine & wine sector, and the operation of an integrated system will increase the number of workplaces in the long term. This will have a very important effect on the development of employment opportunities in the region.

The modernisation of MWR assists the majority of the 13 428 vine growers registered in MWR.

Figure 3.

Factors and organisations determining the modernisation of MWR



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A SZŐLŐ-BOR VERTIKUM STRATÉGIÁJÁNAK TUDOMÁNYOS ALAPJAI, KÜLÖNÖS TEKINTETTEL A MÁTRAALJAI BORVIDÉKRE

Dr. MAGDA SÁNDOR – Dr. GERGELY SÁNDOR

Munkánk célja a szőlő-bor vertikum stratégiai aspektusainak bemutatása, a legnagyobb területű hegyvidéki borvidékünk, a Mátraaljai Borvidék jelenlegi helyzetének részletes feltárása, elemzése.

[1] A tanulmány a T 037411 számú, „Az agrárstruktúrák helyzete, a fejlesztés lehetőségei és konfliktusai Észak-Magyarországon az ezredforduló után" című, az Országos Tudományos Kutatási Alap által támogatott kutatómunka zárójelentése alapján készült.

A tanulmány megalapozásához kérdőíves felmérést végeztünk a Mátraaljai Borvidék hegyközségei körében. Információkat kértünk a hegyközségi vezetőktől az adott hegyközség jellemzőiről, és kikértük véleményüket a borvidék jelenlegi helyzetéről, fejlesztésének lehetőségeiről.

A felmérés tárgya volt továbbá a hiányzó infrastrukturális elemek, köztük a hiányzó szőlőfeldolgozó, -tároló, borpalackozó kapacitások kvalitatív és kvantitatív jellemzőinek behatárolása, létrehozásuk feltételei; a termelői érdekű szaktanácsadás helyzete, korszerűsítésének feltételei; a térségi meteorológiai és növényvédelmi előrejelző rendszer kialakításának feltételei, hatása a gazdaságosságra és a környezetvédelemre.

Vizsgálatunk tárgya továbbá: a piacvezérelt fajtapolitika karaktere, feltételei; a hiányzó vezérbor(ok) kialakításának aspektusai, a velük kapcsolatos marketing jellegzetességei; a versenyképes méretű pinceszövetkezetek létrehozása, az Internet alapú termelői-vevői beszerzés és értékesítés rendszere, és a Mátraaljai Bor Kereskedőház által összehangolt marketing hatékony megvalósítása.

E tanulmányunkban a terjedelmi korlátok miatt nem közlünk minden általunk készített és elemzett táblázatot, csak az azokból levont következtetéseket tesszük közzé.