

ANALYSIS OF THE VINEYARDS SECTOR IN ALBANIA

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ABSTRACT

This document provides an analysis of the Albanian vineyards, wine and raki value chain and relevant development trends, with the purpose of identifying the main points of strengths and weaknesses of the sector, the opportunities and constraints and threats to further development and providing some suggestions and priorities for improvement. The objective of the sector analysis is to give a quantitative and qualitative description of the relevant sectors.

The analysis carried out for the purposes of the sector study, were based on a review of existing secondary data (statistics, reports, other literature) and on primary data collected through interviews with value chain operators. In addition, there were conducted semi-structured interviews with farmers and wineries.

The study analysis the sector taking into consideration production both production on farm and industry trends, value chain map and value chain actors, processing industry, market and trade, of grape (both table grape and grape for processing), wine and raki (spirit) produced from grape.

The secondary data was retrieved from MARDWA/MAFCP and INSTAT (e.g. data on farm and processing production), UNSTAT and EUROSTAT (data on international trade), FAOSTAT (comparative supply/consumption data with other countries). A thorough literature review of previous studies, reports, and articles was carried out as well and the list of the reviewed documents/studies is found in the bibliography. Other data collected by various projects and organizations was also used and quoted respectively.

Keywords: sector analysis, trend, wine, data collection, rural area, production

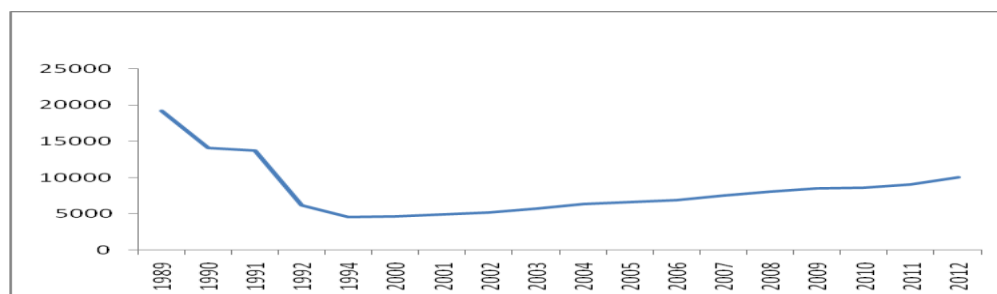
INTRODUCTION

1. Grape, wine and raki production trends

Albania has an old tradition in vineyard cultivation and wine making. After World War II, the area under plantation with vineyards increased drastically – from 2,430 Ha in 1950 to 12,320 Ha in 1970 and continued to expand until reaching the peak in 1980's with a total surface of 20,000 ha, organized in state-run cooperatives and farms. In the early 1990's, following the reforms, civil unrest and the abrupt dissolution of the cooperative-type system, the agricultural sector was severely damaged. The area of vineyards in Albania

declined by about $\frac{3}{4}$ between 1989 and 1994 as the complete collapse of the collective farming system caused a radical de-collectivization and fragmentation of Albanian agriculture (Figure 1). The productive performances of the new vines planted in the first years of transition were characterized by several constraints such as small farm size and low efficiency in inputs use (WB, 2007).

Figure 1: Area cultivated with vineyards (Ha)



Source: FAOSTAT

Since 2000 production of grapes has more than doubled, due to increasing yields and cultivated surface area. Cultivation of grapes is typically made in two types of plantations, namely vineyards and pergolas. Pergolas are used by farmers mainly for self-consumption needs, while vineyards are used for larger-scale production

Table grapes are grown in pergolas and vineyards. Grapes from pergolas are used mostly for self-consumption and local trade. There is no clear separation, especially in rural areas, between table grapes and grapes for wine – it is still common to find local wine grape varieties sold as table grapes. On the other hand, production and trade statistics do not distinguish table grapes from grapes for wine.

Table 1: Dynamics grape production, by type between 2000 and 2012³

Description	2000	2005	2006	2007	2008	2009	2010	2011	2012
Pergola (grapes)									
Total (000 trees)	4 638	5 364	5 488	5 520	5 483	5 503	5 501	5 743	5 859
In production (000 trees)	3 856	4 536	4 708	4 757	4 713	4 916	5 100	5 208	5 380
Yield (kg/trees)	11.9	12.3	13.0	15.0	13.6	13.5	16.2	16	15.2
Production (000 tonnes)	46	56	61	71	64	66	83	83	81
Yearly increase		4%*	10%	17%	-10%	4%	26%	0%	-2%
Vineyard (grapes)									
Total (ha)	5 824	7 994	8 357	9 103	9 755	9 806	9 712	10 073	10 136
In production (ha)	4 613	6 637	6 915	7 497	8 061	8 532	8 630	9 077	9 348

³Includes both table grapes and grapes for wine

Yield (quintals/ha)	70.5	90.1	96.6	97.0	111.0	113.0	118.6	123.4	123
Production (tonnes)	33	60	67	73	89	96	102	102	115
Yearly increase		17%*	12%	9%	23%	8%	6%	0%	13%
Grape total (000 MT) **	78	116	128	144	154	163	185	185	196
Grape total (000 Mt)	79	115	128	147	154	163	184.9	195.2	196

* Average yearly increase during 2000 – 2005. **Source: MAFCP 2011 and INSTAT 2013

According to assessments by experts from public extension services, in most regions the share of grapes used as table grapes range from 10-35 per cent according to expert assessment – no official statistics are reported about the separation of both types of grape at national or regional level.

Domestic production dominates domestic supply grapes. The share of imports has been sensibly reduced in recent years – scoring less than 5 per cent of the domestic supply in 2012 – as the result of increased domestic production and decreased imports in absolute values.

One of the factors stimulating domestic production (and indirectly imports substitution) has been the introduction of government subsidies for new plantations of vineyards as its shown in table 2.

Table 2: Dynamics of production and supply of grapes(MT)

Item	2000	2006	2007	2010	2011	2012
Total production	79 300	127 800	146 500	184 900	195 200	196 800
Import	5 419	11 000	6 726	5 109	7 427	5 032
Export	12	10	0	13	48	240
Total supply (apparent consumption)	84 707	138 790	153 126	189 996	202 580	201 592
Import/supply (<i>total grapes</i>)*	6%	8%	4%	3%	4%	2%

Source: MOAFCP (production), UNSTAT (import – export) * Author calculation based on expert assessment

Production of wine has marked decrease on farm level by almost 1/3, while production of wine by the domestic wineries has increased since 2005 by 27%. Domestic production of wine dominated the domestic consumption/supply; however, the share of import to domestic consumption has increased significantly (by 55%) since 2005. The table 3 below shows that the relationship between the wine reported produced on farm compared to wine reported produced on wineries is changing from 2005 to 2012: from 6.7:1 in 2005 to 3.5:1 in 2012. This trend demonstrates an increased professionalism in the sector – which also was observed during the field interviews.

Table 3: Production, trade and supply of wine by year (Hl)

Category	2005	2010	2012	2012/2005
Farm	115453	83758	75872	66%
Agroindustry	17144	19928	21769	127%
Total production	132597	103686	97641	74%
Farm/total production	87%	81%	78%	
Import	20948	25492	26157	125%
Export	3	263	66	
Supply (apparent consumption)	153542	128915	123732	81%
Import/supply	14%	20%	21%	155%

Source: *MARDWA Statistical Sector & MAFCP Statistical Year Book, trade UNSTAT*

Production of spirits, mainly raki, is very high and the percentage of grapes used for producing spirits is unusually high for a Mediterranean country. Most raki production takes place at farm/household level and it is informal – very small share takes place at agroindustry, while imports of raki are low.

2. Value chain Map

The product flow from farmer to consumer goes through three main channels which may be named table grape channel, on farm processing channel, and the industrial processing channel.

The table grape channel is still modest. Part of table grape is consumed on the farm and the rest is reaching retail market, either through direct sales on the road sides or given to family and relatives, or via wholesalers. The last deal mainly with table grape imports which are still important particularly out of domestic grape production season.

On farm processing channel is the major marketing channel. On farm wine production amounts to some 75,872 hl which is 3.5 larger than industrial wine production (21,769 hl). On farm raki production (136,715 hl) is almost on farm production with only negligible raki production going through industrial channel. Large quantity of wine and particularly raki is consumed at home – important raki stocks have been accumulated due to both increased production and changes in consumer's lifestyles; people tend to consumer more wine than they did in the past. The rest of home produced wine and raki reaches consumers (popular restaurants, direct sales at roadsides or sold to friends and relatives).

Industrial processing channel is consisted of two sub channels, though the separation is not clear-cut, namely integrated production and coordinated production. While in integrated production, substantial quantities of wine grapes come from integrated farm as part of the same business, in case of coordinated production, there are large quantities of

grape supplied by farmers that are not part of wine producing business. Integrated production is quite common, particularly in case of high quality wine producing companies. In case of coordinated production, wineries tend to establish close relationships with supplying farmers, offering them technology advice and sometimes even inputs.

Very often processors in industrial channel perform also wholesaler function (some of them have also retail outlets in the major cities, mainly in Tirana). The retail market for formal industrial production is restaurants, shops and supermarkets.

Part of industrial channel is also informal processing sector which is quite large. The informal sector is represented by unregistered wine producing companies or restaurants which buy grape and produce the wine they serve in their restaurants. Formalizing this sector is expected to lead to huge benefits in terms of fairer competition among wine producers, improving wine safety and quality, improving environment standard and increasing tax revenues.

3. value chain actors

3.1 Producers/farmers

Most agriculture holdings in Albania are mixed and (semi)subsistence farms. This is also the case for most farms cultivating vineyards. Less than 1 per cent of farms with vineyards have more than 1 Ha of area cultivated with vineyards (Table 4).

Table 4: Distribution of the vineyard farms by the size (including both table and wine grapes)

Cultivated are of vineyards in blocks	2012
	No of farms
0 – 0,2 Ha	39137
> 0,2 – 0,3 Ha	7847
> 0,3 – 0,4 Ha	3240
> 0,4 – 0,5 Ha	2568
> 0,5 – 0,75 Ha	2562
> 0,75 – 1 Ha	773
> 1 –	289
Total	56416

Source: MARDWA Statistical Sector upon request

Semi-professional or professional grape growers have typically about 1 ha of vineyards, but the average size is growing. According to Imami (2011), whose study covered various regions in Albania, the main destination of raki is restaurants and bars – 47 per cent of the vineyard farmers that process grapes sell more than half of the produced raki to this category of buyers. Self-consumption is the second most important destination. Wine is also characterized by similar pattern of destination as raki - restaurants and bars are the main destination. In 2012, on farm there is processed 75,872 Hectolitres of wine, which marks a decrease by 1/3 compared to 2005, and 136,715 Hectolitres of raki (Table 6) – the decrease for the same period is 9%.

Table 6: On farm/households production of wine and raki by year (HI)

Product	2005	2010	2012	2012/2005
Raki	149769	128254	136715	91%
Wine	115453	83758	75872	66%

Source: MARDWA, Statistical Sector

The significant decrease of on-farm production of wine, confirms the shift of consumer purchases towards higher quality wine imported (as shown by import statistics) and to some extent, domestic wine produced by wineries.

Among the most common planted varieties are Albanian autochthonous grape varieties, such as Sheshi i Zi and Sheshi i Bardhe. Albania has 57 autochthonous grape varieties. That having said, none of grape varieties are yet internationally recognised as autochthonous Albanian varieties. This is a challenge for developing wine quality schemes such as Protected Designation of Origin and other schemes. New plantations are largely made by international varieties such as Merlot, Cabernet Sauvignon, Sangiovese, Chardonnay, Sauvignon Blanc and others.

Production of grapes is geographically distributed relatively uniformly across the country. The main production area is located between the hills and the coast of Central Albania. Fier, Berat, Elbasan and Vlora, are the regions with the highest share of output; these four regions account for more than half of the national output of grapes. Production of on-farm wine is concentrated in the qarks of Fier, Vlore, Shkoder and Lezhe - these qarks produce almost 4/5 of the total on farm wine produced in Albania (Table 7). Fier alone produces almost 29% of the total domestic on farm wine. This high concentration of wine production is related to tradition and paves way for introducing regional brands.

Table 7: On farm/households production of wine and raki in 2012

Region	Production of Wine (HI)	Price (ALL/litter)	Production of Raki (HI)	Price (ALL/litter)
Berat	3967	289	15956	406

Diber	228	253	7182	440
Durres	3998	211	8942	419
Elbasan	1219	201	12351	478
Fier	21737	209	14750	468
Gjirokastrë	495		6646	522
Korce	4408	244	9578	415
Kukes	66		3862	455
Lezhe	10260	226	17904	424
Shkoder	12303	205	12405	375
Tirane	1611	212	10540	462
Vlore	15580	205	16599	446
Total	75872	211	136715	440

Source: MARDWA, data provided upon request

3.2 Processing industry

During early 1990ies, grape and wine production and consumption fell significantly. The grape production base was largely destroyed as part of the agriculture reform, while former state owned companies were privatized and stopped or reduced their production activity. The production of wine and Raki took place mainly on farm, informally, largely for self-consumption and relied on direct sales to households.

However, during the last decade, the production of wine at agroindustry level increased significantly (by almost 3 times compared to 2000) (Table 8). There were established many new wineries – in some cases, emigrants returned to Albania (e.g. typically from Italy) with capital and know-how, investing in new wineries. On the other hand, the changes in consumer income and life style marked a shift towards higher quality wine, which represented an opportunity for professional wineries to grow.

Table 8: Dynamics of wine production by wineries

Description	2000	2005	2010	2011	2012	2013
No of enterprises	22	40	104	100	98	94
Production (Hl)	7413	17144	19928	20764	21769	22353

Source: MARDWA

Production of wine in Albania has increased three times between 2000 (7,413 HI) and 2012 (22,353 HI). Main factors behind such a substantial increase are associated with both supply and demand conditions. In terms of supply, there has been important investment both at farm level to increase the vineyard area and processing level to increase processing capacity. Investment from returned emigrants counts for a significant share at farm as well as processing level. It is important to highlight that emigrants have brought both source of funding and – most importantly – know how particularly in terms of wine technology and oenological knowledge. Many investing emigrants still maintain professional relationships with professionals in other (EU) countries, mainly Italy. In terms of supply, we observe an obvious change in Albanian consumers' lifestyles – switching for raki consumption to wine consumption.

The potential for high quality wine is important given current supply and demand conditions. On the demand size, tourism development, particularly coastal tourism development is expected to create an increasing demand for high quality wine.

Wineries are concentrated in the qarks/regions of Durres, Berat, Tirane, Fier and Shkoder. While Durres and Tirana have an advantage of being the largest urban areas where purchasing power is concentrated, the high number of wineries in Berat is more related to the establishment of a cluster, including several high quality producers.

Production of wine (agro industry level) is highly concentrated in Durres (45% of the total production) while production of Raki is concentrated in Berat (almost 1/3 of production) (Table 9). There should be noted, however, that not all wineries are registered, and not all registered wineries report (to state authorities or also in the case of surveys carried out by state institutions) all production – large share of production of registered wineries is done directly to households (on informal basis). Therefore, there should be caution when analysing these figures.

Table 9: Distribution of wine and raki production for the year 2013

Wine			Raki		
Regions	HI	Share	Regions	HI	Share
Durres	9998	45%	Berat	1090	31%
Vlore	3570	16%	Durres	607	17%
Berat	2250	10%	Vlore	390	11%
Gjirokaster	1460	7%	Gjirokaster	326	9%
Shkoder	1045	5%	Kukes	289	8%
Fier	1000	4%	Korce	274	8%
Lezhe	945	4%	Shkoder	153	4%

Korce	936	4%	Lezhe	153	4%
Elbasan	628	3%	Tirane	105	3%
Tirane	520	2%	Fier	50	1%
Kukes	0	0%	Elbasan	40	1%
Total	22,352	100%	Total	3477	100%

Source: MARDWA, data provided upon request

Berat, Përmet (in the region of Gjirokaster) and Lezha are the most reputed areas for quality wines.

- *Berat* is one of the most important region for wine production in Albania and home of one the largest cluster of wineries (13 registered processing units), including “Luani”, one of the former large scale State wineries, which was privatised and “Çobo”, which has been the among the first Albanian wineries to pursue a policy of quality linked to the territory.
- *Përmet* is another area known for quality wines. However, this quality remains a potential, as production is small.
- *Lezha* is an area with a few wineries, but which is closely associated to the grape variety “Kallmet”, which has its core production are in this region, and which is appreciated by many Albanian consumers.

Other production clusters are located in Fier and Vlora and the area between Tirana and Durres.

4. Market and trade

As in most countries with a long tradition in wine-making, wine and spirits from grape are part of the consumption pattern of most Albanians. Within the country, Coastal and Southern Albania had a more consolidated tradition of wine and raki production and consumption. Changes in lifestyles are resulting also in modification of consumption patterns: demand of raki is diminishing, especially in urban areas, while consumption of wine is increasing and structure of demand becoming more articulated and sophisticated. However, the average per capita consumption is still far below the world average, and also lags behind the European, particularly the South European on average. Per capita wine supply is slightly higher than 20% of that of South Europe (Table 10).

Table 10: Trend of wine supply in Albania, Europe and World (Kg/capita/year)

Country/year	1990	1995	2000	2005	2006	2007	2008	2009	South Europe = 100
Southern Europe	45.3	42.1	38.5	35.5	34.7	32.2	31.8	31.4	100.0%

Year	Export hl	Export USD	Import hl	Import USD	Export/ Import
2000	-	-	2,920.8	314,890	0.0%
2005	0.3	606	20,948	2,872,779	0.0%
2006	182.3	21,216	19,644.9	3,155,613	0.9%
2007	0.2	3,204	22,938.3	4,765,412	0.0%
2008	52.4	18,374	24,587.3	5,986,292	0.2%
2009	39.0	15,849	25,291.1	5,770,568	0.2%
2010	263.7	69,221	25,491.6	6,002,486	1.2%
2011	56.3	28,921	26,971.2	7,173,918	0.4%
2012	66.6	35,130	26,157.3	6,868,351	0.5%

Source: UNSTAT

According to UNSTAT data, Italy is by far the most important import partner constituting around 2/3 of total imports of wine or about 17,000 hectolitres followed by Spain, Montenegro and France that together make up to 25% of total imports. The wine from France is the most expensive around 649 USD per hectolitres. The second most expensive is the Italian wine with around 265 USD per hectolitres. The cheaper wine is that coming from Greece around 144 USD per hectolitres.

The highest level of **grape imports** in the last years was recorded in 2011 around 7,200 Mt, in that year the imports of grape constituted about 10% of total fruits imports. In 2012 the imports of grape decreased again going to about 5,000 Mt. While the imports of fruits have been decreasing from about 95,000 Mt in 2007 to about 74,000 Mt in 2012 a decrease of 21,000 Mt or 22% (Table 12).

Export of grape is increasing. Despite the increase, the exports of grape still remains inferior compared to imports. In 2012 the exports were only 5% of imports, and the export of grape to total export of fruits only 2.3%.

Table 12: Share of grape imports and exports to total fruit imports and exports

Year	Imports (Mt)			Exports (Mt)		
	Fruits	Grape	Grape/Fruits	Fruits	Grape	Grape/Fruits
2007	95,288	6,726	7.1%	1,462	0	0.0%
2008	79,433	5,026	6.3%	2,034	1.4	0.1%
2009	77,832	4,073	5.2%	1,958	0	0.0%

2010	85,316	5,109	6.0%	2,526	13	0.5%
2011	70,366	7,427	10.2%	4,006	48	1.2%
2012	73,759	5,032	6.8%	10,423	240	2.3%

Source: UNSTAT

The **import** of **wine** has been increasing constantly in the recent years reaching the highest level in 2011 approximately 760 million ALL. While the share of wine imports to total imports of beverages, spirits and vinegar has slightly decreased from 8.5% in 2007 to 7.7% in 2012 indicating that the import of other beverages have been increasing more than the import of wine. Exports of wine have been increasing reaching the highest level in 2010 around 7.2 million ALL from only 0.3 million in 2007, in the years following 2010 the exports of wine decreased again but still remains higher compared with 2007. The highest share of wine exports to total exports of beverages was recorded in 2010 about 4.1% (Table 13). However, there should be noted that the contribution of wine to the total exports is insignificant (despite recent increase) and there is still a high deficit in the international trade.

Table 13: Share of Wine imports and exports to total beverages imports and exports

	Imports (000 ALL)			Exports (000 ALL)		
	Beverages, spirits and vinegar	Wine	Wine/Beverages Total	Beverages, spirits and vinegar	Wine	Wine/Beverages Total
2007	5,430,138	463,810	8.5%	754,796	289	0.0%
2008	7,545,645	541,901	7.2%	123,084	2,237	1.8%
2009	8,208,432	588,518	7.2%	223,637	1,599	0.7%
2010	9,397,402	663,403	7.1%	175,050	7,213	4.1%
2011	10,222,969	760,155	7.4%	163,461	2,919	1.8%
2012	9,728,847	752,449	7.7%	354,130	4,129	1.2%

Source: UNSTAT

5. CONCLUSIONS AND RECOMMENDATIONS

Based on the analysis, the following recommendations at farm level, processing and diversification and institution level has been formulated with the aim sector growing,

professionalization, efficiency increase, quality enhancement and increased competitiveness.

Farm level

Support to formalization and strengthening of emerging seedlings market. Government should continue to support vineyard establishment using certified seedlings and farmers certified seedlings.

Insufficient wine grape production represents a bottleneck for winery capacity exploitation. Hence *a need to support new vineyard creation of re-establishment of existing vineyard* in such a way as to meet processing industry needs.

Support to modernize physical asset base at farm level. Major investments to support are new or renovated irrigation systems and purchase of specialized machinery and equipment.

Establish “model” vineyard farms. Chain analysis in the vineyard and wine sector highlight that grape production technology, postharvest practice and technology, and management capacities at farm level are at best insufficient. In this context, it should be appropriate that public policies support the establishment of vineyard model farms. Two types of model farms may be considered, one for table grape production and another one for wine grape production, giving the preference to autochthon grape varieties.

Support to grape producers organizations. Production technology, postharvest practices, lack of sorting, grading, packing, labeling and cold storage infrastructure and equipment result in high costs and low product price. Low sale prices are due to low farmers negotiating power, but also due to insufficient knowledge, facilities, and storage and cold storage infrastructures. This calls for producer groups support.

Processing level

Support to private investment in the wine producing industry. Evidence shows that there are considerable investments in wine producing industry. That having said, technology is often incomplete, particularly for third category wineries, link between farm/wineries and market is weak and the impact of agribusiness on farm is very limited.

Support development of quality scheme, such as Geographical Indications (GI). As discussed earlier, there is autochthon varieties closely related to specific areas (Serina in Korca, Vlosh in Vlora, Pules in Berat, Kallmet in Lezha and Debine. Such an attachment to a specific cultivar to a certain geographical areas represents a potential for developing wine quality scheme, including GI but not limited to.

Support to cold storage infrastructures and in company training on grape storage. Increased cold storage capacity for fruits and vegetables are still needed. This is important in terms of quality preservation, domestic market supply for a longer period and export market. Additionally, the knowledge on cold storage technology need improvement. In company training/coaching therefore needed.

Diversification level

Support tourism related wineries. Support should be given to high quality wineries in the form of support to establish testing rooms, accommodation for tourists, training on management, etc.

Institutional level

Strengthen the regulatory framework and bring the Law on Wine into full EU compliance and *Establish the wine cadastre.* Wine cadastre is not yet operational though it has started to be established at Fushe-Kruja ATTC. The professionalization of the wine sector calls for setting up a fully operational wine cadastre.

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