



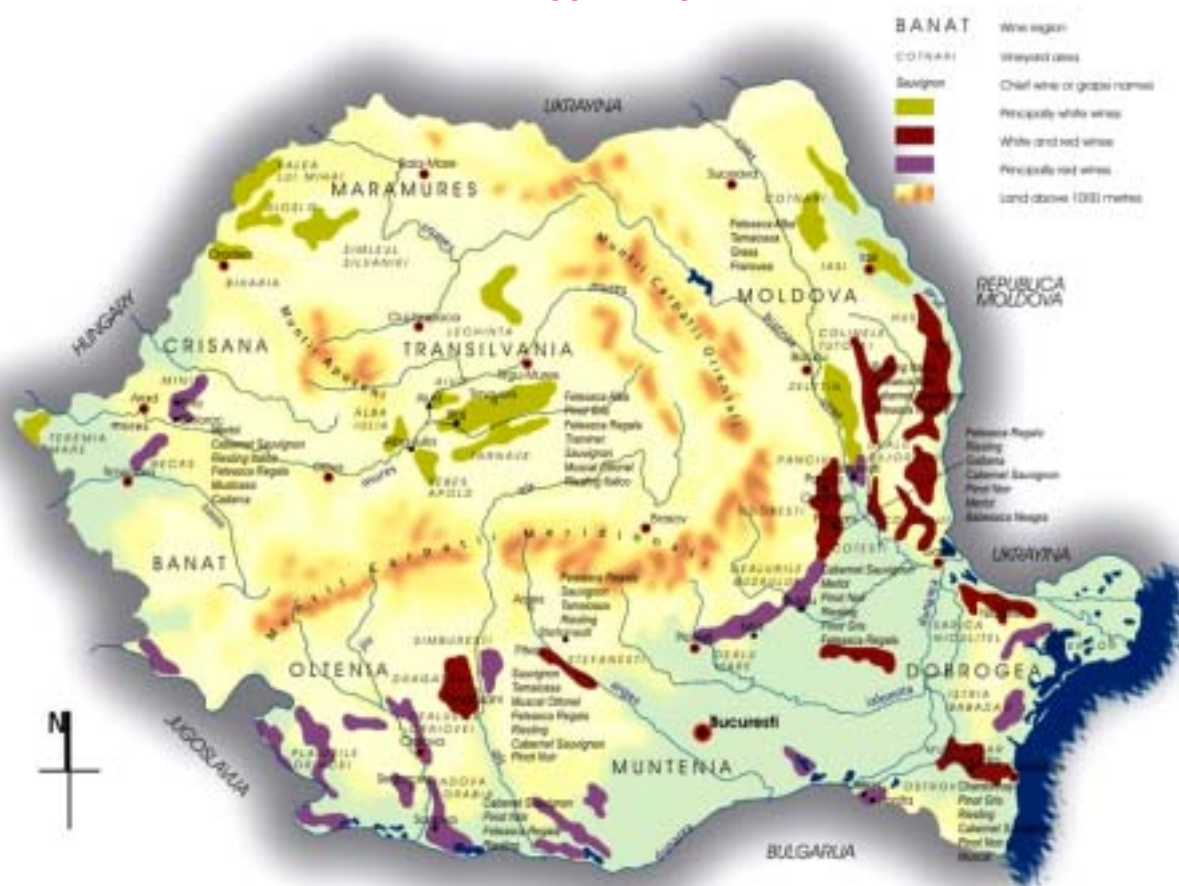
# ROMANIA – WINE COUNTRY

## Glossary

<b>ADAR</b>	Association of Accredited Wine Tasters of Romania
<b>APEV</b>	Wine Exporters and Producers Association of Romania
<b>CRCE</b>	Romanian Centre for Foreign Trade
<b>DOC</b>	Wines with controlled denomination of origin
<b>EC</b>	European Commission
<b>EU</b>	European Union
<b>FAO</b>	Food and Agriculture Organisation
<b>HG</b>	Government Decision
<b>HPD</b>	Hybrid Direct Producer
<b>ICT</b>	Information and Communication Technology
<b>ICVV</b>	Vine and Wine Research Institute
<b>IGP</b>	Wines with protected geographic indications
<b>INS</b>	Institute of National Statistics
<b>ISCTV</b>	State Inspectorate for Viticultural and Technical Control
<b>MoAFWE</b>	Ministry of Agriculture, Forests, Waters and Environment
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>OIV</b>	Organisation Internationale du Vin
<b>OG</b>	Government Ordinance
<b>OMA</b>	Decision of the Agriculture Minister
<b>ONDOV</b>	National Office for Controlled Denominations of Origin
<b>ONIV</b>	National Wine Interprofessional Organisation
<b>ONVV</b>	National Vine and Wine Office
<b>RADA</b>	Romanian Agri-Business Development Activity
<b>USAID</b>	United States Assistance for International Development
<b>WEPA</b>	Wine Exporters and Producers Association of Romania
<b>WTO</b>	World Trade Organisation

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## HARTA VITICOLA A ROMANIEI



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### Foreword

Romania is a major European wine country with rich historic and cultural traditions, many of them directly related to this marvellous drink, rightfully considered *divine liquor*.

Today the country builds its own future in consonance with that of the European Union and in this sense undergoes profound changes, while aspiring to become a valued member of the world wine community as a producer of highly praised quality wines.

### History



The beginnings of viticulture in this part of the world go back at least 4,000 years. Legend says that Dionysos, the god of wine, was born in Thracia, on what is nowadays the territory of Romania.

Romania or Dacia as the Romans knew it, had a well-established wine culture. The abundance of food and fame of the Dacian wines were so well-known and tempting that, to put an end to the migratory peoples' repeated invasions, the Dacian king Burebista (1st century BC), ordered the destruction of all vineyards, as his high Priest Deceneu suggested.

The coins issued by Romans after having conquered Dacia (106 AD) or *Dacia Felix* (Happy Dacia) as the new Roman province was called, presented on their obverse a woman to whom two children were offering grapes, a symbol of the region's main riches...and a proof that not all the vineyards were uprooted.

In more recent times, the Romanian viticulture knew several distinct stages, each with its specific impact upon the country's wine industry.

Thus, the 19th century, right up to the outbreak of the First World War, was characterised by ample and close links with France. In the viticultural sector these links culminated with the French wine growers' advice and practical help extended after the last two decades of the 19th century, when phylloxera hit Romania. The result was that much of the post-phylloxera replanting was carried out using "French" vine varieties: Pinot Noir, Cabernet Sauvignon, Merlot, Chardonnay, Sauvignon Blanc and others.

The inter-war period was characterised by closer links to Germany and Austria, when the "spritzer": wine mixed with sparkling mineral water (another local wealth) was introduced into Romania.



During the communist rule (1948-1989), three distinct types of wine-producing organizations developed: research institutes, wine estates, and co-operative vineyards linked to state wineries. The emphasis was put on quantity rather than on quality. Nevertheless, the Romanian wines used to get many important awards in the international contests.

The liberalization of the economy after 1989 has led to a series of profound changes in the Romanian wine industry. The "co-operative" vineyards have been returned to their private owners, the state wineries and the wine estates are being largely privatized, and the research institutes currently strive to redefine their core role in the vine and wine sector.

### Location, Climate and Soil

Although climatically very different, Romania lies on the same latitude as France. The main geographical features, which also temper the continental climate of the country are the Black Sea, the Danube and the height of the Carpathian Mountains. The mountain range occupies almost half the country, rising to about 2,500 metres and enclosing the Transylvanian plateau, situated at about 400 metres above sea-level. In the south, the Danube (Dunarea) flows through a sandy plain, turning north towards its delta and isolating the province of Dobrogea with its opening to the Black Sea.

The continental climate, with hot summers and cold winters, moderated by such local factors as those mentioned above, the soils, basically stony and well-drained around the Carpathians, but more alluvial and sandy in the coastal area and, last but not least, the exposure to sun light and "warmth" of the Romanian soul are the key factors determining the quality of wines produced in what many would consider a God-blessed wine country.

### The Vineyards

The total area under vine was 242,700 ha in 2002, which represents 1.7% of the total arable land of Romania. The vine and wine sector share amounts to over 7% within the total vegetal production and to about 4% within total agricultural production. Wine ranks the third among the exported agri-food products.

The vineyard area devoted to wine-grape production is spread throughout the country (see the map). The areas under vine differ from one another in as far as the climatic conditions are concerned (i.e. 4-5 weeks earlier harvests in south for the same grape variety), as well as from the geological point of view (i.e. differences determined by altitude, position, slope, sun exposure, presence of river or lakes, etc.), which altogether come under the concept of "terroir".

Table 1: Area under vine, 1998-2002 (ha)

	1998	1999	2000	2001	2002
TOTAL	255,030	250,030	249,170	247,635	242,700

Source: MoAFWE and INS

Table 2: Area under vine, by main wine regions (ha)

Wine Regions	1998	1999	2000	2001	2002
TOTAL, of which:	255,030	250,030	251,170	247,635	242,700
Moldova	87,023	86,179	85,893	85,700	83,500
Dobrogea	25,301	25,057	24,463	22,182	24,200
Muntenia	80,460	69,871	70,439	69,570	74,300
Oltenia	34,437	42,760	43,570	43,418	35,100
Banat	4,368	4,117	3,763	3,700	3,700
Crisana & Maramures	10,973	11,527	11,284	11,184	11,100
Transylvania	12,468	11,462	11,758	11,873	10,800

Source: MoAFWE and INS

From the viticulture point of view, one can differentiate among Wine regions, Wineries or viticulture centres, Vineyards and Viticulture areas.

Their complete list can be viewed on line or downloaded in PDF format at [www.wineromania.com](http://www.wineromania.com).

### The Grapes

The main foreign varieties of Western European origin, with well-known oenological characteristics, which have been successfully adapted to Romanian vine-growing conditions, are as follows :

- Merlot, Cabernet Sauvignon, Pinot Noir as reds
- Chardonnay, Sauvignon Blanc, Pinot Gris, Italian Riesling, Traminer, Aligote and Muscat Ottonel, as whites

Worth mentioning are also several extremely valuable native Romanian varieties, which deserve a particular interest and a larger description, are those mentioned below:

- Babeasca and Feteasca Neagra as reds; and
- Feteasca Regala, Francusa, Grasa, Galbena, Busuioaca and Tamaioasa as whites

By region, the main grape varieties vary as follows:

**Banat** : Italian Riesling, Sauvignon Blanc, Pinot Noir, Cadarca, Merlot, Burgund Mare.

**Crisana-Maramures**: Cabernet Sauvignon, Pinot Noir, Cadarca, Merlot, Burgund Mare, Italian Riesling, Feteasca Regala, Muscat Ottonel.

**Dobrogea:** Pinot Gris, Chardonnay, Muscat Ottonel, Italian Riesling, Sauvignon Blanc, Cabernet Sauvignon, Pinot Noir, Merlot.

**Moldova:** Feteasca Regala, Muscat Ottonel, Aligote, Cabernet Sauvignon, Tamaioasa Romaneasca, Babeasca Neagra, Grasa, Francusa, Galbena, Busuioaca.

**Muntenia-Oltenia:** Cabernet Sauvignon, Pinot Noir, Merlot, Burgund Mare, Feteasca Neagra, Feteasca Alba, Italian Riesling, Pinot Gris, Muscat Ottonel, Sauvignon Blanc.

**Transylvania:** Feteasca Alba, Traminer Rose, Sauvignon Blanc, Muscat Ottonel, Feteasca Regala, Italian Riesling.

The detailed list of authorised and recommended grape varieties can be viewed on line or downloaded in PDF format at [www.wineromania.com](http://www.wineromania.com).

## Native Varieties

### Feteasca Alba

This is an old Romanian variety and is grown in most vineyards, especially in Moldavia and Transylvania. Wines are dry or semi-dry, having a balanced content of alcohol (11.5-12% by volume), acidity and sugar, and feature a natural finesse. At Cotnari, the Feteasca Alba yields natural semi-sweet and sweet wines produced by separate or assorted vinification.

### Feteasca Regala

The variety originates from Transylvania and is grown in most vineyards. Wines range from table to high quality ones. The wines have an alcoholic content of 10.5-11.5% by volume. They are dry, fresh and have high acidity and a specific flavor.

### Grasa de Cotnari

This grape belongs to the old Cotnari vineyard, where it has been grown since the days of Stephen the Great. It is picked when it shrivels and is attacked by botrytis cinerea. The sugar content is high: over 240 grams per litre.

### Babeasca Neagra

The variety which yields Babeasca Neagra red wines is an old native grown in the vineyards of Moldavia (Odobesti, Cotesti, Panciu, as well as other areas located in the south of this viticultural zone).

### Feteasca Neagra

An old indigenous variety, it is grown in several viticultural areas of central and southern Moldavia (Vrancea, Galati, Vaslui), as well as in Dealu Mare and Stefanesti Arges vineyards of Muntenia. They are dry or semi-dry (sugar content ranging between 6-12 grams per litre), have an alcohol content of 12-12.5% by volume, a deep red color with ruby shades, specific flavor resembling the blackcurrant and at the same time are robust and smooth, getting richer by ageing.

### Tamaioasa Romaneasca

It is used for the production of high quality aromatic wines. Tamaioasa Romaneasca wines are naturally sweet or semi-sweet wines with an alcohol content of 12-12.5% by volume and an imposing originality offered by their yellow-golden color, complex flavor resembling field flowers and honey, persistent rich taste where alcohol, sugar and acidity reach a perfect harmony. Tamaioasa is usually released for sale as an aged wine when the frankincense character of the fruit is overlaid by a developed, honeyed bouquet. However, it can also be attractive when young, especially when the must has had extended cold skin contact before pressing and fermentation.

## Grape Production

The recent evolution of grape production was the following:

Table 3: Winegrapecrush, by main wine regions (tons)

Wine Regions	1998	1999	2000*	2001	2002
<b>TOTAL, of which:</b>	<b>1,061,266</b>	<b>801,870</b>	<b>885,608</b>	<b>1,028,383</b>	<b>1,028,900</b>
Moldova	413,893	270,689	394,349	418,560	418,980
Dobrogea	63,914	67,531	64,009	103,568	82,895
Muntenia	321,787	222,118	200,105	261,955	269,400
Oltenia	180,686	173,296	145,439	157,393	166,400
Banat	7,425	9,741	7,778	12,177	12,211
Crisana-Maramures	31,264	34,383	40,338	26,995	28,814
Transylvania	42,297	23,512	33,590	47,735	51,200

Source: MoAFWE and INS

## Wine Production

The evolution of wine production during the period 1998-2002 is illustrated below:

Table 4 – Wine production, by main wine regions, 1998-2002 (hl)

Wine Regions	1998	1999	2000	2001	2002
<b>TOTAL, of which:</b>	<b>6,688,000</b>	<b>5,001,900</b>	<b>6,054,000</b>	<b>6,200,000</b>	<b>5,089,800</b>
Moldova	2,861,700	1,940,780	2,450,000	2,500,000	2,035,500
Dobrogea	482,080	413,440	613,700	621,000	400,800
Muntenia	1,912,330	1,542,510	1,859,720	1,600,000	1,530,000
Oltenia	985,400	715,960	783,700	954,000	492,200
Banat	56,310	64,050	35,840	73,000	57,700
Crisana-Maramures	161,110	178,330	298,700	162,000	261,300
Transylvania	229,070	146,830	112,340	290,000	312,300

Source: MoAFWE and INS

Tabelul 5 – Wine production by types, 1998-2002 ('000 hl)

ITEM	1998	1999	2000	2001	2002
<b>TOTAL, of which:</b>	<b>6,688.0</b>	<b>5,001.9</b>	<b>6,054.0</b>	<b>6,200.0</b>	<b>5,089.8</b>
Whites	5,023.2	3,624.7	3,824.0	4,370.0	3,489.8
Reds	1,664.7	1,377.2	2,230.0	1,830.0	1,600.0
Table wines	5,932.0	4,169.1	5,024.0	3,836.7	3,644.0
High quality & DOC wines	756.0	832.8	1,030.0	1,619.0	1,445.8

Source: MoAFWE and INS

### Wine Demand

Retail sales of wine decreased in Romania, both in volume and value terms, reflecting the consumer switch to cheaper, lower quality table wine due to decreasing purchasing power, high excise levels and decreasing grape production. In addition, the impressive growth of beer consumption and reduced beer excises were responsible for the greater drop in wine sales in 1998-2001.

In 2001 wine consumption in Romania amounted to 4.7 million hl against 7.3 million hl in 1997. Average per capita consumption of wine dropped from 32.4 liters in 1997 to only 20.5 liters in 2000, being situated below the E.U. average, which gravitates around 37 litres. Considering the shares in total world wine consumption, Romania places itself on the 10th position, with 2.1%, far below the relevant figures in leading consuming countries, such as France (15.4%), Italy (13.9%), United States (9.7%), Germany (9.0%), Spain (6.4%), Argentine (5.5%) and UK (4.6%).

The importance of homemade wine increased during transition due to the great number of subsistence households, land fragmentation, decline in real incomes as well as the slowly implemented economic reforms. Self-production covers, thus, a large proportion of total wine consumption.

Table-wine dominates total wine consumption, although its demand is declining. White wine prevails in the Romanian consumers' preferences holding 68.6% of the total market in 2001, followed by red wine with 31.4%. Rosé wines practically do not count as they hold an insignificant share of the market.

### Wine Supply

In 2001 supply reached 5.1 million hl (6.0 mio hl in 1999), of which the wines with denomination of origin represented but a small share, respectively 9.5%. At the same time, wines with protected geographic indication held 18.8%, the remainder being represented by table wines with 71.6%. By colour, white wines were dominant in 2001 with 68.6% of the total, followed by red wines with 31.4%.

The varietal composition of Romanian vineyards present a great diversity and offer the wine industry the chance to produce a large range of quality wines. Romania can offer up to 402 different types of wine, of which 11 types for normal consumption, 42 types of so-called Superior Wines (VS), and 349 wine types with controlled denominations of origin, including those with grades of quality (DOC).

### Wine Foreign Trade

Wine has all needed potential to become one of the most important agricultural exports of Romania, provided the sector is adequately supported to enhance its productivity, quality and promotion techniques.

#### Exports

In 2002, Romanian wine exports reached a level of 504.5 thousand hl, in value of 23.0 million US\$, meaning a recovery in comparison with year 2000, when the volume of exports were 253.5 thousand hl, in value of 17.7 million US\$. In perspective, wine exports are planned to exceed the target figure set for the years to come, namely 60 million US\$.

Germany continues to represent, one of the main markets for Romanian wine exporters, with a share in 2002 of 30,3% in volume and 32,6% in value terms (44.0% and 44.2%, respectively, in 2000). On the following positions there were countries like the Republic of Moldova, UK, the Russian Federation, Japan, the United States a.o. Exports are highly concentrated in few markets, the first eight importing countries holding together almost 80% of the total Romanian wine exports in 2002.

Table 6 – Romanian Wine Exports, by main destinations, 2000

Country	hl	'000 US \$	\$/Liter
Germany	150,510	7,938	0.53
UK	22,570	2,912	1.29
USA	5,940	896	1.51
Russian Fed.	17,920	830	0.46
Denmark	6,160	581	0.94
Japan	8,640	551	0.64
Israel	5,900	545	0.92
Sweden	5,970	488	0.82
Others	29,900	2,996	1.00
<b>Total</b>	<b>253,510</b>	<b>17,737</b>	<b>0.70</b>

Table 7 – Romanian Wine Exports, by main destinations, 2001

Country	hl	'000 US \$	\$/Liter
Germany	173,820	8,697	0.50
UK	14,270	1,679	1.18
Moldova, Rep. of	50,300	1,407	0.28
Czech Rep.	24,090	917	0.38
Japan	15,320	880	0.57
USA	5,390	878	1.63
France	22,320	624	0.28
Israel	5,950	573	0.96
Others	83,250	4,014	0.48
<b>Total</b>	<b>394,720</b>	<b>19,670</b>	<b>0.50</b>

Table 8 – Romanian Wine Exports, by main destinations, 2002

Country	hl	'000 US\$	\$/Liter
Germany	152,360	7,476	0.49
Moldova, Rep. of	218,110	6,540	0.30
UK	11,230	1,523	1.36
U. S.A.	5,850	1,021	1.75
Czech Rep.	35,180	895	0.25
Israel	8,820	791	0.90
Denmark	7,000	735	1.05
Italy	23,270	401	0.17
Russian Fed.	6,740	294	0.44
Others	35,970	3,368	0.94
<b>Total</b>	<b>504,530</b>	<b>23,045</b>	<b>0.46</b>

Source: CRCE

## Imports

In 2002, Romanian wine imports reached a level of 7,770 hl, in value of 1.76 million US\$, meaning an increase in value terms as compared with year 2000, when the volume of imports were 13,100 hl, in value of 1.2 million US\$.

The main exporting countries to Romania were Germany, France, Italy, Spain, Republic of Moldova and Hungary.

Table 9 – Romanian Wine Imports by Country of Origin, 2000

Country	hl	'000 US \$	\$/liter
Germany	4,360	397	0.91
France	1,040	226	2.18
Italy	760	187	2.47
Moldova, Rep. of	3,320	96	0.29
Spain	130	41	3.17
Hungary	220	18	0.80
Others	3,280	284	0.87
<b>Total</b>	<b>13,100</b>	<b>1,250</b>	<b>0.95</b>

Source: CRCE

Table 10 – Romanian Wine Imports by Country of Origin, 2001

Country	hl	'000 US \$	\$/liters
France	1,320	390	2.94
Italy	940	213	2.27
Germany	1,300	194	1.50
Spain	430	134	3.10
Moldavia, Rep. of	320	21	0.65
Hungary	100	16	1.60
Others	2,510	368	1.47
<b>Total</b>	<b>6,930</b>	<b>1,337</b>	<b>1.93</b>

Table 11 – Romanian Wine Imports by Country of Origin, 2002

Country	hl	'000 US \$	\$/liters
France	1,510	660	4.38
Italy	2,200	530	2.40
Germany	690	166	2.41
Austria	170	22	1.27
Spain	150	57	3.66
Portugal	80	35	4.54
Others	2,970	292	0.98
<b>Total</b>	<b>7,770</b>	<b>1,762</b>	<b>2.27</b>

Source: CRCE

### Regulatory Context

Wine is included, unjustifiably, among alcoholic beverages. The Value Added Tax of 19%, and the high excises (see below) led to a corresponding fall in consumption of wine, in favour of other alcoholic drinks, especially beer and vodka, which benefited of very expensive and aggressive marketing campaigns.

As from 1 July 2003, following the interventions of WEPA and ONIV, the level of excise duties applied to still wines were reduced from €0.55 to €0.30 / hl / alcoholic degree. At the same time, the wine producers were exempted from paying the health tax of 2% on their turnover, as previously imposed by Government Ordinance 22/1992.

Beginning with 2004, once the new Fiscal Code will enter into force, the authorities promised to eliminate the excise duties applied to still wines, as well as to exempt all wines from the compulsory fiscal stamps system.

Table 12 – Level of excise duties (December 2003)

Item	Euros / hl / 1 alcoholic degree
Vermouth & fortified wine	2.5
Sparkling wine (Champagne method)	3.0
Sparkling wine	1.0
Still wine	0.3 (0.55 before 01.07.03)

The establishment of the common market organisation for the wine industry that is envisaged in the near future will have further impact on the wine market in Romania, as it happens nowadays in the European market, in general.

### The Place of Romania on the International Wine Market

Based on the size of its vineyard areas and its grape and wine productions, Romania is placed among the 10 top wine countries in the world. From this point of view, Romania holds advantageous positions in comparison with the other European countries, as well (figures refer to year 2001, as shown in Table 13):

Position 5 in as far as the vineyard areas are concerned (5.8% of the total surface covered with vines in Europe), after Spain, France, Italy and Portugal.

Position 6 as regards the grape production (3.6% of total grape production in Europe), after Italy, France, Spain, Germany and Greece.

Position 6 as regards the wine production (2.9% of the total European wine production), after France, Italy, Spain, Germany and Portugal.



Table 13 – Hierarchy of Wine Producing Countries in Europe, 2001 (%)

Crt. No.	Vineyards		Grape Production		Wine Production	
	Country	%	Country	%	Country	%
1	Spain	26.0	Italy	29.7	France	30.5
2	France	20.6	France	25.2	Italy	26.8
3	Italy	18.8	Spain	16.7	Spain	16.3
4	Portugal	5.8	Germany	4.6	Germany	5.1
5	<b>Romania</b>	<b>5.8</b>	Greece	3.9	Portugal	3.7
6	Greece	2.9	<b>Romania</b>	<b>3.6</b>	<b>Romania</b>	<b>2.9</b>
7	Bulgaria	2.7	Portugal	2.9	Hungary	2.8
8	Moldova, Rep. of	2.6	Hungary	2.5	Greece	22.4
9	Germany	2.4	Ukraine	1.6	Russian Fed.	1.6
10	Ukraine	2.4	Moldova	1.4	Austria	1.2
11	Hungary	2.1	Bulgaria	1.3	Bulgaria	1.0

Source: FAO

Table 14 – Romanian Wine Industry...at a glance (Key statistical data)

ITEM	2000	2001	2002
Area under vine ('000 ha)	251.2	247.6	242.7
Winegrapecrush ('000 tons)	885.6	1,028.4	1,028.9
Wine production ('000 hl), of which:	6,054.0	6,200.0	5,089.8
Whites	3,824.0	4,370.0	3,489.8
Reds	2,230.0	1,830.0	1,600.0
Table wines	5,024.0	3,836.7	3,644.0
High quality and DOC wines	1,030.0	1,619.0	1,445.8
Wine consumption ('000 hl)	656.3	459.2	496.4
Per capita annual wine consumption (litres)	29.1	20.4	22.0
Wine exports (mio USD)	17.74	19.67	23.04
Wine exports (mio hl)	253.5	394.7	504.5
Wine imports (mio USD)	1.25	1.34	1.76
Wine imports (mio hl)	13.1	6.9	7.8

Source: MoAFWE, CRCE and INS

## Romanian Wines

The varietal composition of Romanian vineyards present a great diversity and offer the wine industry the chance to produce a large range of quality wines. According to wine specialists, Romania can offer up to 402 different types of wine, of which 11 types for current consumption, 42 types of so-called Superior Wines (VS), 349 wine types of controlled denominations of origin (DOC).

Out of the Western grape varieties with well-known oenological characteristics Romania produces:

- Merlot, Cabernet Sauvignon, Pinot Noir as red wines;
- Chardonnay, Sauvignon Blanc, Pinot Gris and Muscat Ottonel as white wines.

At the same time, Romania produces a range of refined wines from its native grape varieties, namely:

- Babeasca si Feteasca Neagra as red wines;
- Feteasca Regala, Francusa, Grasa, Galbena, Busuioaca and Tamaioasa as whites

See details in the Section dedicated to [Producers](#) and [Wines](#)

In view of joining the European Union, Romania has recently harmonised its wine legislation (i.e. Vine and Wine Law no. 2443/2002 and the accompanying technical regulations no. 1134/2002 on oenological practices and techniques), by bringing it in line with the EU Regulations (EC R 1493/1999 and 753/2002).

The above Law recognizes the following categories of still wines:

### Wines for current consumption

VM – Table wine

VMS – Superior table wine

## Quality Wines

VS - quality wines with geographic denomination, also known as “Country Wine”, “Landwein” or “ Vin de Pays”;

DOC - high quality wines with a controlled denomination of origin (grapes with min. 180 gr. sugar):

DOC - CMD: Harvested at full maturity ( grapes with min. 187 gr. sugar);

DOC - CT: Late harvest ( grapes with min. 220 gr. sugar);

DOC - CIB: Noble harvest ( grapes with min. 240 gr. sugar and noble rot).

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Further details and updates can be obtained from [www.wineromania.com](http://www.wineromania.com) or [apev@fx.ro](mailto:apev@fx.ro)

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