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Historical Perspectives and Future Directions in Turkey's Wine Industry: A Comprehensive Literature Review

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Abstract

The Turkish wine industry is shaped by a long viticultural history, yet it remains small in scale and visibility due to limited domestic consumption, restrictive regulations, and high taxes. The purpose of this research is to examine the development, challenges, and future potential of Turkey's wine sector using a systematic literature review approach. Academic publications and industry reports were reviewed to analyse key themes such as regulatory constraints, production structure, consumer trends, export barriers, and the role of wine tourism. To deepen the analysis, this study applies a SWOT framework to identify internal strengths and weaknesses, as well as external opportunities and threats. Comparative benchmarking with Italy is also used to highlight actionable strategies from a globally recognized wine-producing country. The findings of this thesis show that despite serious structural and policy limitations, there is a growing interest in Turkish wines both domestically and internationally—especially among younger urban consumers and niche global markets. However, strategic coordination and institutional support are still needed to enhance competitiveness and sector-wide visibility. The results suggest that Turkey's wine industry holds untapped potential, particularly through wine tourism, targeted marketing, and support for indigenous grape varieties. These conclusions are intended to guide policymakers, producers, and wine professionals working toward a more sustainable and internationally integrated wine sector in Turkey.

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List of Abbreviations

AB – Avrupa Birliği (European Union in Turkish)

BFJ – British Food Journal

CAB – CABI (Centre for Agriculture and Bioscience International)

CABI – Centre for Agriculture and Bioscience International

COVID – Coronavirus Disease

DOC – Denominazione di Origine Controllata (Italy)

DOCG – Denominazione di Origine Controllata e Garantita (Italy)

EU – European Union

FAO – Food and Agriculture Organization (of the United Nations)

GI – Geographical Indication

IJWBR – International Journal of Wine Business Research

JSTOR – Journal Storage (Digital Library)

OECD – Organisation for Economic Co-operation and Development

OIV – International Organisation of Vine and Wine

PDO – Protected Designation of Origin

PGI – Protected Geographical Indication

PRISMA – Preferred Reporting Items for Systematic Reviews and Meta-Analyses

SLR – Systematic Literature Review

SWOT – Strengths, Weaknesses, Opportunities, and Threats

UNESCO – United Nations Educational, Scientific and Cultural Organization

VIVA – Valutazione dell'Impatto della Vitivinicoltura sull'Ambiente (Italian Sustainable Wine Certification)

ZFW – Zeitschrift für Wirtschaftsgeographie (Journal of Economic Geography

1. Introduction

Historical evidence indicates that grape cultivation and winemaking in Anatolia began thousands of years ago, making Turkey one of the earliest centers of viticulture (Ozay, Akyol, & Azabağaoğlu, 2005). Despite this deep heritage, the country's modern wine industry is relatively young and remains modest in scale. Turkey possesses the fifth-largest vineyard area globally—approximately 410,000 hectares as of 2022 (International Organisation of Vine and Wine [OIV], 2021)—yet only an estimated 3–5% of the annual grape harvest is used for winemaking (Gümüş & Gümüş, 2008). Most grapes are consumed fresh or dried (raisins), reflecting the dominance of table grape production over wine production. Notably, ampelographers have identified between 600 and 1,200 indigenous grape varieties in Turkey (e.g., Kalecik Karası, Öküzgözü, Boğazkere), though fewer than 60 of these are cultivated commercially for wine (Evren & Akdoğan-Odabaş, 2024). This abundance of unique grape genetics underscores an untapped potential frequently cited by experts who see Turkey as an "exciting new frontier" in the wine world (OIV, 2021). However, compared to established wine-producing countries, Turkey's wine sector is still considered underdeveloped and occupies a small niche in both domestic and international markets (Ozay et al., 2005; Gümüş & Gümüş, 2008).

Several historical and structural factors provide context for the current state of the Turkish wine industry. During the Ottoman period, alcohol production was largely confined to non-Muslim communities, and even in the early decades of the Turkish Republic, wine remained a marginal industry. The first state-supported commercial winery was established in 1925 as part of Atatürk's modernization reforms (Ozay, Akyol, & Azabağaoğlu, 2005). Major shifts occurred in the late 20th and early 21st centuries: economic liberalization in the 1980s and the abolition of the state alcohol monopoly in 2001 created space for private wine production and imports (Gümüş & Gümüş, 2008; Evered & Evered, 2016). By 2006, the number of licensed wineries had risen to approximately 70, and by 2021 this number had reached around 184, reflecting an increase in boutique wineries and regional initiatives (Evren & Akdoğan-Odabaş, 2024).

Simultaneously, the tourism boom in the 1980s and 1990s contributed to growing interest in regional wines, especially in areas like Cappadocia and Thrace, where wine tourism is now an emerging sub-sector (Yurtoğlu, 2019). Nevertheless, domestic wine consumption remains extremely low—estimated at 1.0 to 1.3 liters per capita annually—compared to the European average of about 26 liters (World Population Review, 2024; Evren & Akdoğan-Odabaş, 2024). This disparity is partly attributable to cultural and religious norms in Turkey's predominantly Muslim society, where alcohol consumption is often socially sensitive, limiting local demand (Aydın, 2011).

Moreover, the industry operates under increasingly restrictive policy and market conditions. Since 2013, all alcohol advertising, promotion, and sponsorship have been banned by law, and online sales of alcoholic beverages are prohibited (Evered & Evered, 2016). Turkey also imposes one of the highest alcohol taxation rates in Europe, with special consumption taxes on wine exceeding 63%—a major factor driving up prices and discouraging domestic consumption (Gümüş & Gümüş, 2008). These policies, alongside broader challenges such as economic instability and the prevalence of unregistered alcohol sales, significantly constrain formal wine producers (Evren & Akdoğan-Odabaş, 2024).

Many Turkish winemakers identify heavy taxation, regulatory barriers, and the absence of supportive government policies as the leading constraints facing the industry (Gümüş & Gümüş, 2008). As a result, wineries often rely on tourism and small export niches rather than the domestic market for sustainability and growth (Evren & Akdoğan-Odabaş, 2024).

Despite these constraints, there are optimistic indicators. Turkish wines have increasingly received international recognition, with wineries collectively winning more than 1,000 medals in global competitions since 2004 (OIV, 2021). A growing movement now aims to revive and promote indigenous grape varieties and regional terroirs, which may provide competitive advantages in the global market (Ozay et al., 2005). Thus, the Turkish wine industry today represents a compelling contrast of ancient heritage and contemporary innovation. This backdrop lays the foundation for a systematic exploration of its developmental trajectory, the central objective of this thesis.

The central aim of this thesis is to provide a comprehensive, evidence-based assessment of Turkey's wine industry through a systematic literature review (SLR). The study seeks to identify key factors influencing the development of the Turkish wine sector—including historical, cultural, economic, and regulatory dimensions—while synthesizing insights on its current challenges and opportunities. It also aims to pinpoint knowledge gaps that warrant further investigation. Ultimately, this thesis aspires to provide some policy recommendations about how Turkey's wine industry can advance strategically—leveraging its strengths and addressing its structural weaknesses—to enhance competitiveness and sustainability in the global wine landscape (Snyder, 2019; Tranfield, Denyer, & Smart, 2003).

Motivations: Several considerations motivated this research. First, there is a clear academic gap in the literature. While Turkey's viticultural heritage is ancient, scholarly work on the modern Turkish wine industry remains limited, fragmented, and often outdated. Few systematic or interdisciplinary studies have been published; existing works tend to focus narrowly on areas such as regional branding (Azabağaoğlu et al., 2006) or marketing challenges (Yüceer & Bilici, 2017), lacking a comprehensive synthesis that links past developments with current dynamics. The literature thus fails to provide an integrated view of the sector's evolution. By conducting a SLR, this thesis responds to calls for more structured and rigorous synthesis efforts in management and policy research (Mahoney, 1993; Okoli, 2015). SLR is particularly effective at consolidating scattered knowledge and presenting findings in a manner that is accessible to scholars, practitioners, and policymakers alike.

Secondly, there are strong practical motivations tied to Turkey's underutilized potential in wine production. Although the country has abundant indigenous grape varieties and favourable terroirs, its contribution to both the national economy and international wine markets remains disproportionately small (Gümüş & Gümüş, 2008; Evren & Akdoğan-Odabaş, 2024). Observers frequently highlight Turkey's "great potential" in global wine production—conditional upon overcoming barriers such as taxation, branding deficiencies, and market access (Ozay, Akyol, & Azabağaoğlu, 2005; OIV, 2021). Through the review of academic and grey literature, this research aims to extract actionable insights into how policy reform, investment in quality, and wine tourism development can enhance the competitiveness of the sector. Understanding past patterns and present obstacles is vital for informing forward-looking strategies.

Finally, this study is motivated by a broad interest in the ways historical, social, and policy factors interact in the Turkish context. The Turkish wine industry brings together traditional winemaking heritage and contemporary regulatory challenges (Aydın, 2011; Evered & Evered, 2016). This combination offers a meaningful context for research across different academic fields, including history, sociology, business, and public policy. The findings of this review are intended to support academic understanding and may also inform industry stakeholders and policymakers seeking to encourage the sustainable development of Turkey's viticultural sector.

This thesis is structured around a central research question designed to systematically synthesize, critically evaluate, and comprehensively map the existing academic and grey literature on Turkey's wine industry. Rather than generating primary empirical data, the study aims to contribute a nuanced understanding of how scholarly literature conceptualizes the sector's competitive positioning, structural dynamics, and strategic directions by applying a SWOT framework informed by Porter's theories of competitive advantage and industry structure (Porter, 1980; Porter, 1990).

How does existing academic and grey literature conceptualize and critically assess the competitive strengths, structural weaknesses, external opportunities, and threats shaping the development of Turkey's wine industry?

This broad research question addresses multiple dimensions of scholarly discourse by examining how existing studies identify and interpret Turkey's inherent competitive advantages (e.g., historical viticultural heritage, unique terroir), internal structural limitations (e.g., fragmented domestic market, restrictive regulatory environment), external strategic opportunities (e.g., international market expansion, evolving domestic consumer trends), and external threats (e.g., global competitive pressures, socio-political constraints). By synthesizing these aspects through the SWOT-Porter analytical lens, the thesis aims not only to identify dominant theoretical patterns, critical knowledge gaps, and areas for future research but also to provide strategic insights that can inform stakeholders' decision-making processes. Furthermore, this structured, theory-driven approach ensures methodological rigor and clarity, enhancing the practical and academic relevance of the systematic literature review (SLR).

2. Methodology

This review applies a systematic literature review (SLR) methodology, guided by the PRISMA framework to ensure comprehensive, transparent, and replicable reporting (Moher et al., 2009).

2.1 Systematic Literature Review (SLR): concepts and aims

A SLR is a research methodology designed to conduct a comprehensive, transparent, and replicable review of existing literature on a well-defined topic. Unlike traditional narrative reviews, which may be subjective or selective, an SLR applies a structured protocol including predefined research questions, rigorous search strategies, and explicit inclusion and exclusion criteria (Tranfield, Denyer, & Smart, 2003; Okoli, 2015). This method minimizes bias by ensuring that the literature selection process is both exhaustive and transparent. As Tranfield et al. (2003, p. 214) highlight, systematic reviews aim to "minimize bias through exhaustive literature searches… and by providing an audit trail of the reviewers' decisions." Originating in the health sciences, SLRs have since been widely adopted in the social sciences and management fields to improve rigor and reproducibility in literature-based research (Snyder, 2019).

In this thesis, the SLR method is selected deliberately, given the multidimensional nature of the research topic. The development of Turkey's wine industry involves historical, economic, cultural, and policy-related factors, and the relevant literature is dispersed across disciplines and document types. A systematic review enables the researcher to capture peer-reviewed academic works as well as credible grey literature and synthesize them with methodological clarity. This transparency not only enhances the credibility of findings but also ensures that conclusions are grounded in the full body of available evidence, rather than a narrow or convenience-based sample (Okoli, 2015).

Another key reason for employing the SLR approach is its capacity to identify research gaps and points of consensus. Rather than simply summarizing prior studies, an SLR helps detect inconsistencies, underexplored areas, or emerging themes—information which is essential for guiding future research agendas (Snyder, 2019). In the context of Turkish wine, where existing research is limited and fragmented, such mapping is particularly useful. Moreover, the method's focus on evidence-based synthesis aligns with the thesis's practical aim: to offer insights that can inform policy and industry practice. For instance, if recurring findings in the literature indicate that high taxation constrains market development, these can support evidence-based recommendations for policy reform. In short, applying the SLR methodology in this thesis offers a robust and defensible foundation for analyzing Turkey's wine sector in a scientifically credible way.

2.2 Literature Search Strategy

The literature search strategy for this systematic review was carefully designed to ensure thoroughness, transparency, and reproducibility, in line with best practices for SLR methodology (Okoli, 2015; Tranfield, Denyer, & Smart, 2003).

Search Planning: To begin, a set of search terms was developed based on the thesis' research questions and an initial scoping review of the topic. Keywords and key phrases included: "Turkish wine industry", "Turkey AND wine production", "Turkish viticulture", "wine tourism in Turkey", and "Turkey AND alcohol policy". Additional terms related to specific grape varieties or regions (e.g., "Anatolia wine", "Öküzgözü", "Boğazkere") were also incorporated to broaden the scope and ensure context-specific coverage.

These keywords were systematically combined using Boolean operators (AND, OR) to create comprehensive and flexible search strings. One example search string was: (Turkey OR Turkish) AND (wine OR winery OR viticulture OR vineyard OR enology) AND (industry OR market OR tourism OR policy).

This approach enabled the inclusion of literature addressing diverse dimensions of the Turkish wine industry, including its economic structure, cultural context, policy environment, production capacity, and tourism links. The aim was to capture both academic and sectoral perspectives across various disciplines and document types, ensuring a wide and balanced representation of relevant scholarship.

Databases and Sources: Multiple academic databases were searched to cover different fields. The core databases included Web of Science, Scopus, and Google Scholar for scholarly articles, as well as subject-specific databases like CAB Abstracts (for agriculture-related studies) and Hospitality & Tourism Complete (for tourism-related studies). Additionally, recognizing that not all insights on the Turkish wine industry might be in international journals, we searched regional databases and repositories, such as DergiPark (for Turkish academic journals) and the Turkish National Thesis Center (for graduate theses). To capture industry and policy documents, we included searches of grey literature: for instance, reports from the International Organisation of Vine and Wine (OIV), Turkish statistical yearbooks, government policy papers, and conference proceedings. We also reviewed news articles and wine magazine features (e.g., Decanter, Grape Collective) for contextual information; while not all of these would be formally "included" in the SLR results, they were useful for background and verification of facts. The search was restricted to English-language and Turkish-language sources where relevant and feasible to translate, given the local nature of much data.

All database searches were conducted between March 2024 and December 2024, and the results were stored and categorized in Excel file to keep track of records. Search results and iteration: The initial searches yielded a broad set of literature. For example, searching Google Scholar with the above terms returned several hundred results, which were then filtered by relevance. Limits were applied where possible to refine the results—for example, by focusing on publications from approximately the last 40 years (1980s onward) to emphasize the modern period of the industry, while still including earlier seminal works. Snowball searching was also performed by reviewing the reference lists of key papers to identify additional sources not captured through database queries, and by using citation tracking to locate more recent studies that cited those key works. This process continued until a point of saturation, where new searches were mostly yielding duplicates or well-known references.

Screening and Documentation: Following the initial search, all retrieved titles and abstracts were screened against the pre-established inclusion and exclusion criteria (see Section 2.4). At this stage, clearly irrelevant results were excluded—such as articles referencing "turkey wine" in the context of Thanksgiving food pairings, or studies about countries mistakenly identified as "Turkey" in geographic metadata.

The screening process was documented using a PRISMA-style flow diagram, which recorded the number of studies identified, screened, included, and excluded, along with the reasons for exclusion at each stage. This visual representation enhanced transparency and replicability, which are fundamental principles of SLR methodology (Moher et al., 2009).

The search process, including databases consulted, time frame covered, and exact search terms used, is reported in sufficient detail to enable replication by future researchers. By casting a wide net and then applying systematic filters, this strategy ensured that the literature base used in this thesis is both comprehensive and unbiased—minimizing selection bias and enhancing methodological rigor (Tranfield, Denyer, & Smart, 2003; Okoli, 2015).

2.3 Scope of the Review

The review primarily covers literature published from the 1980s to the present day. The selection of the 1980s as a starting point is intentional: this period marks a significant turning point in Turkey's economic and regulatory landscape, particularly with the onset of liberal economic reforms and the gradual dismantling of the state alcohol monopoly (Ozay, Akyol, & Azabağaoğlu, 2005). These developments laid the groundwork for private sector involvement in wine production, the emergence of boutique wineries, changes in domestic consumption culture, and the integration of Turkish wine into global markets (Gümüş & Gümüş, 2008).

By focusing on the post-1980 period, the review captures the modern era of the Turkish wine industry, characterized by entrepreneurial growth, shifting regulatory frameworks, and increasing interest in regional identity and export potential. However, earlier historical sources are included where necessary to provide foundational context—particularly those addressing Anatolia's ancient viticultural heritage and milestones such as the establishment of state-owned wine enterprises in the early Republican period (Ozay et al., 2005).

Thus, while the core literature spans approximately 1980 to 2025, selective references to pre-1980 works are also incorporated to enrich the background. This chronological framing strikes a balance between analytical relevance and historical completeness, ensuring that the review reflects both contemporary developments and the enduring legacy of Turkish winemaking.

Geographical Scope: The scope of the review is focused on Turkey. Studies that included deal directly with Turkey's wine industry, whether at the national level or specific regions within Turkey (e.g., studies on the Thrace wine cluster, Cappadocia wine tourism, Aegean viticulture, etc.). If a comparative study included Turkey as one of several countries, it was considered only insofar as it had dedicated data or analysis on Turkey. Literature focusing on wine industries in other countries was excluded unless it offered insights transferable to the Turkish context. (for example, a study of another emerging wine country might be discussed in comparison, but it wouldn't be a core included source). By confining the geographical scope to Turkey, the review ensures depth and relevance to the research questions. It is worth noting that Turkey's unique position (straddling Europe and Asia, with a Muslim-majority culture and ancient wine history) means that general findings from other countries may not always apply; hence the need to concentrate on Turkey-specific evidence. Within Turkey, all major wine-producing regions are within scope (e.g., Thrace/Marmara, Aegean coast, Central Anatolia, South-eastern Anatolia). The review also considers national-level analyses such as those by the OIV or Turkish Statistical Institute that cover the whole country's wine sector.

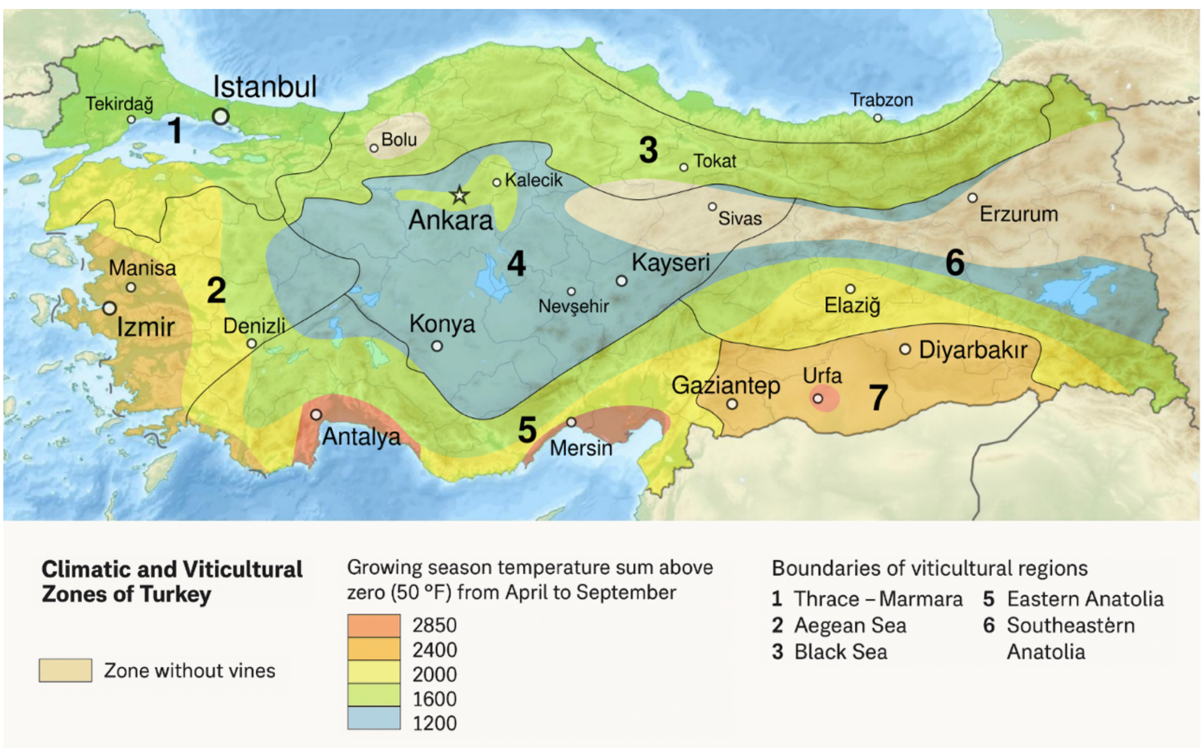

Figure 1. Climatic and viticultural zones of Turkey. Adapted from Bourguignon, E. (2016). Climatic and viticultural zones of Turkey [Map].

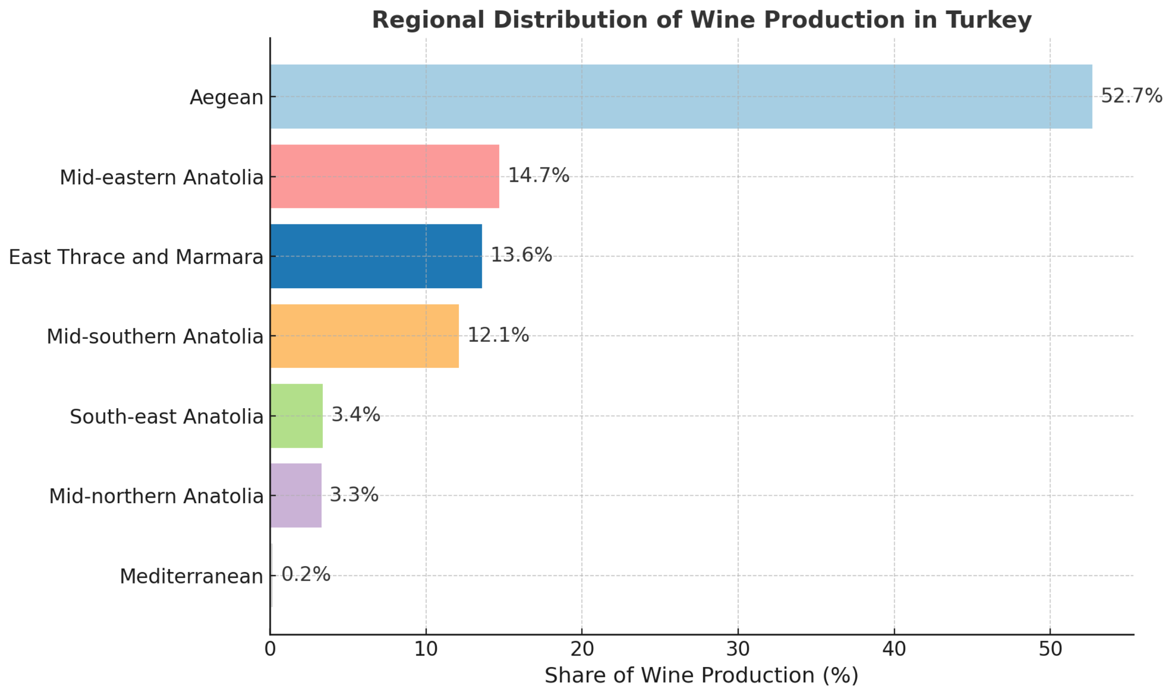

Figure 2. Regional distribution of wine production in Turkey. Source: Wines of Turkey. (n.d.). Wine regions of Turkey. Retrieved June 30, 2025

Thematic Scope: The thematic scope of the SLR is broadly inclusive of any theme relevant to the development of the wine industry in Turkey, encompassing interdisciplinary perspectives. In practical terms, this meant including literature from fields such as agronomy (grape production trends), economics (industry structure, market trends, trade data), business management (marketing, competitiveness, entrepreneurship), sociology/anthropology (cultural attitudes toward wine, consumption patterns), law/public policy (regulatory framework, alcohol laws), and tourism (wine tourism development). For example, a study on Turkish wine consumer behaviour or preferences would be included, as would a paper analyzing the impact of tax policy on winery profitability, or a case study of a particular winery or region. By contrast, boundaries were set to exclude certain topics that fall outside the industry context. purely enological or viticulture science studies (e.g. analyses of grape DNA or winemaking chemistry) were generally excluded unless they had direct industry implications (such as adoption of new viticulture techniques by Turkish wineries). The review is problem-driven, cantered on factors affecting the industry's growth and image, so the inclusion of themes was guided by relevance to the research questions in Section 1.3. Thus, themes like historical evolution, cultural factors, regulatory impacts, market dynamics, production and consumption statistics, export potential, and tourism all fall within scope. This thematic breadth ensures the review can construct a holistic understanding of the Turkish wine industry. However, within this breadth, each source had to have a clear connection to Turkey's wine sector; for instance, a general article on global wine marketing trends would not be included unless it specifically discussed Turkey or could be used in a comparative sense for discussion.

By clearly delineating the chronological, geographical, and thematic scope, the review maintains focus while covering the multifaceted nature of the topic. In summary, the SLR spans the modern era of Turkey's wine industry (with historical context as needed), focuses on Turkey-centric information, and integrates multiple thematic lenses relevant to understanding how the industry operates and evolves.

2.4 Inclusion and Exclusion Criteria

The inclusion and exclusion criteria for this systematic literature review were defined in accordance with the PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) guidelines (Moher et al., 2009), to ensure transparency, reproducibility, and rigor throughout the review process. Before the screening began, I developed a set of explicit criteria to guide the selection of studies and to ensure that only the most relevant and credible sources were included in the final synthesis.

To be included in the review, sources were required to substantially address the Turkish wine industry or closely related aspects, such as production, consumption, marketing, wine tourism, or policy issues within the Turkish context. Studies focusing on specific wine regions or wineries in Turkey, as well as comparative analyses where Turkey was one of the central cases, were also eligible. Preference was given to peer-reviewed journal articles, academic theses, conference papers, and scholarly books or chapters. In addition, high-quality grey literature—such as government and industry reports and internationally recognized data from sources like the OIV—was included, provided that these sources demonstrated sufficient methodological transparency or authority.

The review focused on materials published from 1980 to 2025, although earlier sources were used for historical context when relevant. Both English and Turkish language publications were included, to ensure comprehensive coverage of domestic and international perspectives. Where necessary, key content from Turkish-language sources was translated. Eligible studies had to have a clear connection to at least one of the research questions or thematic areas of interest, and preference was given to empirical studies with robust data or well-developed conceptual analyses.

Conversely, studies were excluded if they did not primarily focus on Turkey's wine industry or if they addressed unrelated subject matter (e.g., "turkey wine" in the context of food pairings or studies focused on other alcoholic beverages without direct relevance to wine). Highly technical viticulture or enology research was only considered if it had industry-wide implications, as this review is concerned with broader market, policy, and cultural dynamics rather than micro-level science. Sources that lacked credibility—such as very short pieces, anecdotal reports, or outdated data—were excluded, as were duplicates or substantially overlapping publications. Only the most complete version of such content was retained. Non-English and non-Turkish language studies were also excluded due to translation limitations and the adequacy of available sources.

All records that passed initial screening were read in full to confirm their eligibility. Reasons for exclusion were tracked to provide an audit trail in line with PRISMA standards. Through this systematic process, a total of 32 high-quality sources were ultimately selected for detailed analysis, providing a robust foundation for the synthesis presented in Chapter 3.

2.5 Theories and Frameworks Applied

In keeping with the structure and rigor of the PRISMA-guided systematic review, it is essential to establish the theoretical frameworks that will be used to interpret and synthesize the findings of the selected literature. While the previous sections described how studies were identified and included, this section outlines the analytical tools—specifically the SWOT framework and comparative benchmarking—that underpin the interpretation of results. These frameworks provide a structured lens for categorizing, evaluating, and comparing the evidence gathered in the review. By defining the analytical approach here, I aim to make transparent how the subsequent discussion and findings chapters are shaped by these frameworks.

2.5.1 SWOT Based Analysis

This thesis employs a structured approach to analyzing and synthesizing existing literature on Turkey’s wine industry by utilizing the SWOT (Strengths, Weaknesses, Opportunities, and Threats) framework with a deliberate emphasis on industry competitiveness and structural dynamics inspired by Porter’s theoretical perspectives (Porter, 1990). Rather than directly evaluating the wine industry itself, this framework is utilized as a meta-analytical tool to critically assess how academic literature has conceptualized Turkey’s wine sector development.

The SWOT analysis facilitates categorizing recurring patterns, key themes, and theoretical gaps found within the literature. By identifying strengths and weaknesses (internal dimensions) as well as opportunities and threats (external dimensions), the thesis systematically captures how scholars have framed the competitive positioning and structural characteristics of Turkey's wine industry (Gümüş & Gümüş, 2008; Özay, Akyol, & Azabağaoğlu, 2005). This method aligns well with Porter’s Diamond Model, which emphasizes factor conditions, demand dynamics, strategic rivalry, and related supporting industries as foundational to competitiveness (Porter, 1990).

Specifically, the literature’s depiction of inherent strengths—such as Turkey’s unique terroir and historical viticultural heritage (Özay et al., 2005; Azabağaoğlu, Akyol, & Özay, 2006)—is balanced against identified internal weaknesses, notably the challenging regulatory environment and fragmented domestic market (Gümüş & Gümüş, 2008; Azabağaoğlu et al., 2006). Concurrently, the SWOT approach captures scholarly perspectives on external opportunities, including export market potential and emerging domestic consumer trends (Seyedimany & Köksal, 2022; Barbaros & Karatepe, 2013), contrasted with significant external threats from political, cultural, and competitive pressures (Aydın, 2011; Doğan & Gümüş, 2024).

Employing this approach allows the thesis to critically evaluate the existing body of knowledge, highlighting dominant academic narratives, identifying gaps such as the need for integrated strategic frameworks, and pointing toward areas requiring further scholarly attention. Ultimately, this structured theoretical layering reinforces the analytical depth of the systematic literature review, ensuring clarity, coherence, and practical relevance in synthesizing academic insights on Turkey's wine sector.

2.5.2 Comparative Benchmarking

In addition to the SWOT framework this thesis applies a comparative benchmarking approach to assess Turkey's wine industry in relation to that of Italy. Italy is selected as the benchmark due to its globally recognized success in wine production, export performance, and cultural integration of wine. The selection is further justified by the academic context in which this research has been undertaken—within a graduate program in Italy focusing on European and Italian wine and food systems, regulations, and heritage. This positioning enables the comparative analysis to draw on both conceptual relevance and institutional proximity, providing a critical external frame through which the structure and development of the Turkish wine sector may be interpreted.

Benchmarking is widely employed in strategic research to identify best practices and performance gaps across sectors or nations. Defined by Camp (1989, p. 10) as "the search for industry best practices that lead to superior performance," benchmarking enables systematic comparison of processes and outcomes. Within a cross-national policy framework, it is considered a valuable tool for understanding differential development trajectories and informing localized strategies (Dolowitz & Marsh, 2000; Rose, 1991). In the context of this thesis, comparative benchmarking serves to situate Turkey's industry within a broader competitive landscape, allowing for a more precise evaluation of its structural constraints and potential opportunities.

This approach operates in methodological alignment with the SWOT framework by supplying a critical referential standard. While SWOT is effective in organizing and diagnosing internal strengths and weaknesses, as well as external opportunities and threats (Gürel & Tat, 2017), it benefits from contextual calibration. Comparative benchmarking provides that calibration by juxtaposing each SWOT dimension against a well-established reference case. For instance, Turkey's internal strengths—such as grape biodiversity and historical viticulture—can be more meaningfully interpreted when contrasted with Italy's deployment of its own regional appellations and grape typicity (Anderson & Pinilla, 2018; Corsi & Pomarici, 2021). Similarly, weaknesses in regulatory support or branding infrastructure become more analytically salient when viewed through the lens of Italy's institutional arrangements and globally integrated market structures (Tosun & Yılmaz, 2022). In this way, the comparative analysis contributes to what Hantrais (2009) terms a "wider frame of reference," enhancing the analytical depth and policy relevance of the findings.

The conceptual logic underpinning the comparative element is further reinforced by Porter's (1990, p. 71) theory of competitive advantage, which posits that the performance of national industries is shaped by interrelated factors—factor conditions, demand conditions, firm structure and rivalry, and related/supporting industries. Benchmarking, in this context, facilitates an assessment of how these factors manifest in different national settings. The Italian wine industry, characterized by its structured quality systems (e.g., DOC/DOCG), high per capita wine consumption, and well-established export markets, offers a model of how synergy between institutional design and market culture can result in sustained competitive advantage (Corsi & Pomarici, 2021; Anderson & Pinilla, 2018). By contrast, the Turkish wine sector is shaped by fragmented domestic demand, restrictive regulations, and a weaker institutional infrastructure. Benchmarking allows for the identification of these differences not as isolated shortcomings but as areas for strategic learning and potential reform.

It is important to note that the goal of the comparative exercise is not to replicate the Italian model in Turkey, but rather to draw policy-relevant lessons and identify transferable elements. As noted in the literature on policy transfer and lesson-drawing, contextual differences must be acknowledged when applying insights across national borders (Rose, 1991; Dolowitz & Marsh, 2000). Nevertheless, many of Italy's structural assets—such as its emphasis on enotourism, coordinated producer networks, and climate adaptation measures—are potentially adaptable within Turkey's viticultural regions. Furthermore, comparative studies in the wine sector have demonstrated the utility of this method in producing actionable recommendations for emerging producers (Galletto, Begalli, & Capitello, 2014). In this thesis, the benchmarking section thus extends the meta-analytical value of the literature review, not only by reinforcing SWOT findings, but by supplying a critical external mirror through which the Turkish wine industry's trajectory can be more clearly understood.

In conclusion, the inclusion of comparative benchmarking contributes to the thesis in three significant ways. First, it strengthens the interpretative depth of the SWOT framework by embedding it within a transnational context. Second, it draws on established academic methods to ensure analytical robustness and practical relevance. Third, it supports the thesis's broader objective of producing a structured synthesis of existing knowledge that can inform both academic discourse and sectoral strategy. Italy's wine sector, as a benchmark case, provides both empirical contrast and conceptual clarity, enabling a more grounded and reflective appraisal of Turkey's competitive position in the global wine landscape.

3. Results and Discussion

3.1 Overview of the Literature and PRISMA Flow Diagram

A systematic literature search was conducted across major international and regional databases, including Scopus (252 records), JSTOR (189 records), Google Scholar (261 records), and DergiPark (157 records). After screening abstracts and removing over 60 duplicate entries, 138 unique articles were identified for full-text review. Of these, 32 studies were selected for qualitative synthesis.

The selected literature spans publications from 1980 to 2025, with the majority of sources published after 2000, reflecting increased academic interest in Turkey's wine industry over the past two decades. The dataset includes peer-reviewed journal articles, academic theses, conference proceedings, and a selection of authoritative grey literature such as government and industry reports. Studies were written in both English and Turkish, ensuring coverage of both international and domestic scholarly perspectives.

In terms of thematic coverage, the selected works address a range of topics relevant to the Turkish wine sector. Key themes include historical development of viticulture and winemaking in Anatolia, economic structure and market trends, regulatory and policy environments, wine tourism, marketing and branding strategies, consumer behavior, and the challenges and opportunities related to indigenous grape varieties. A subset of studies also provides comparative analysis with other countries or explores broader alcohol policy implications.

In addition to the academic studies, over 10 sectoral and statistical reports from organizations such as the International Organisation of Vine and Wine (OIV), Eurostat, Turkish Statistical Institute (TÜİK), U.S. Department of Commerce, Food and Agriculture Organization (FAO), Organisation for Economic Co-operation and Development (OECD), and the World Bank were also included. These reports provided key quantitative data and policy perspectives.

Based on this selected body of literature and data sources, a comprehensive analysis of the Turkish wine industry was conducted. In the following sections, the main findings from the literature are synthesized and critically evaluated using a SWOT framework, highlighting the sector's strengths, weaknesses, opportunities, and threats.

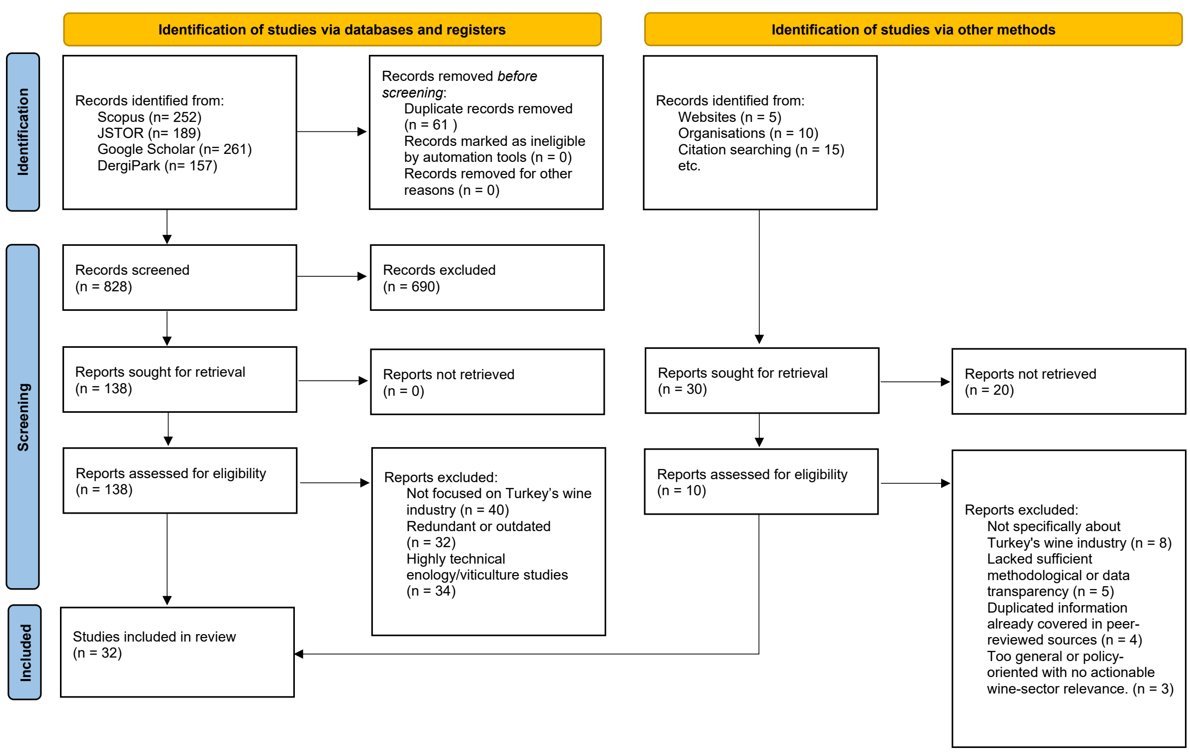

Table 1: PRISMA Flow Diagram. A visual summary of the systematic literature search and screening process used in this study, adapted from the PRISMA 2020 guidelines (Page et al., 2021).

3.2 Main Findings from the Literature

The reviewed literature provides a comprehensive understanding of Turkey's wine industry, emphasizing its historical, structural, and contemporary dynamics. Scholars frequently highlight Turkey's status as one of the world's oldest viticultural regions, underscoring the deep-rooted heritage of grape cultivation and winemaking that dates back thousands of years (Diler et al., 2015; Ribeiro et al., 2020). This longstanding legacy has led to the preservation of a remarkable diversity of indigenous grape varieties and traditional practices, distinguishing Turkey within the global wine landscape. Despite this rich heritage, the current structure of Turkey's wine industry remains modest in scale. Studies point to a sector characterized by fragmentation, with production largely divided between a small number of major wineries and a proliferation of boutique producers. The majority of grapes harvested in Turkey are not destined for wine, but instead are used for table consumption or dried as raisins, limiting the volume and variety available for vinification (Ozay et al., 2005; Kiracı & Şenol, 2017). This structure has direct implications for quality, consistency, and the industry's capacity to scale.

The regulatory and policy environment emerges as a dominant theme in the literature, with repeated emphasis on high taxation, strict marketing restrictions, and complex licensing procedures. Scholars such as Buyrukoğlu et al. (2016) and Koç & Koç (2020) describe these factors as significant barriers to market growth, restricting both production and domestic consumption. Turkey's unique sociopolitical context, shaped by the interplay between secular and religious influences, further complicates the sector's development and public acceptance (Evered & Evered, 2016).

Market and consumer studies reveal that domestic wine consumption remains low compared to other wine-producing countries, with cultural, religious, and economic considerations playing critical roles (Senuyar et al., 2014). Nevertheless, there is evidence of changing attitudes among younger, urban populations, who are increasingly open to wine as part of a modern, cosmopolitan lifestyle (Seyedimany & Koksal, 2022). At the same time, the literature identifies emerging opportunities for export, product diversification, and the integration of wine with tourism and gastronomy, supported by Turkey's strategic location and growing international recognition.

Infrastructure limitations, insufficient research and development, and a lack of coordinated industry support are also frequently noted as constraints. The sector faces challenges in distribution, quality control, and professional training, which hinder its ability to compete both domestically and abroad. Demographic shifts, such as the aging of grape-growing communities and the reluctance of younger generations to remain in agriculture, further threaten the long-term sustainability of the industry (Ayaz, 2024).

Overall, the literature paints a complex portrait of Turkey's wine industry, marked by significant strengths and unique resources, but also constrained by internal weaknesses, external threats, and a dynamic environment that offers both obstacles and opportunities.

3.3 SWOT Analysis of Turkey's Wine Industry

Turkey's wine industry occupies a unique position as one of the world's oldest viticultural regions, yet it faces modern challenges and paradoxes. As a predominantly Muslim country with deep secularist traditions, Turkey's wine sector has evolved under contrasting influences of historical prominence and contemporary socio-political constraints. This review analyzes the Strengths, Weaknesses, Opportunities, and Threats (SWOT) of Turkey's wine industry through a synthesis of academic literature. The analysis is framed by Porter's competitiveness and industry structure concepts, examining how internal resources and capabilities align with external environmental factors. Drawing on research from the last decade (with foundational older studies where relevant), this literature-based SWOT assessment highlights the industry's competitive advantages, structural limitations, external growth prospects, and challenges. In doing so, it provides a strategic synthesis of current knowledge and identifies gaps for future inquiry.

	Strengths	Weaknesses
Internal	• Rich viticultural heritage and natural terroir • High grape biodiversity with unique indigenous varieties • Growing winemaking expertise and international recognition • Strategic location linking Europe and Asia	• Very low domestic wine consumption • Fragmented production structure with scale inefficiencies • High taxes and restricted marketing • Limited enological education and research
	Opportunities	**Threats**
External	• Emerging wine tourism and experiential marketing • Niche export markets for indigenous grape wines • Demographic shifts toward wine among urban youth • Potential policy reform and international collaborations	• Unpredictable regulatory environment and high taxation • Sociopolitical stigma and cultural opposition • Economic volatility and limited access to capital • Climate change affecting vineyard sustainability

Table 2: SWOT Matrix of Turkey's Wine Industry. A strategic synthesis of internal strengths and weaknesses, as well as external opportunities and threats, based on qualitative findings from the systematic literature review and comparative benchmarking (adapted from Gurel & Tat, 2017).

3.3.1 Strengths

Rich Viticultural Heritage and Natural Endowments: Turkey is often regarded as a cradle of viticulture, with grape cultivation dating back millennia in Anatolia (Diler, Şenol, & Aydınoğlu, 2015; Ribeiro, Cihanger Ribeiro, & Santos Duarte, 2020). This historical legacy endows Turkey with an "Old World" wine heritage. Indeed, the country's geography and climate are highly favorable for grape growing – Turkey's mild Mediterranean climate, diverse microclimates, and fertile soils make it an ideal environment for viticulture (Ozay, Akyol, & Azabagaoglu, 2005; Tosun & Yılmaz, 2023). Turkey consistently ranks among the top grape-producing countries globally. It has been noted that Turkey is the 5th largest country in the world in terms of vineyard area and 6th in grape production (Semerci, Kızıltuğ, Çelik, & Kiracı, 2015; Kiracı & Şenol, 2017). These natural factor conditions are a fundamental strength, providing the raw potential for a competitive wine industry.

Diversity of Grape Varieties: A related strength is Turkey's remarkable diversity of indigenous grape cultivars. As a center of Vitis vinifera domestication, Anatolia hosts hundreds of grape varieties, many unique to the region. Sabir et al. (2017) identified a wide genetic variability among local Turkish grapevine genotypes, including rare varietals on the edge of extinction. Such genetic diversity is a valuable resource – it enables winemakers to offer distinctive wine profiles and adapt to various terroirs. Preservation of these local grape varieties has been emphasized as crucial to avoid genetic erosion (Sabir, İkten, Mutlu, & Sari, 2017). In recent years, there is growing interest in reviving and vinifying indigenous varieties (Evered & Evered, 2016; Ayaz, 2024). Wineries have started to produce wines from native grapes like Öküzgözü, Boğazkere, Kalecik Karası, and Narince, which can differentiate Turkey's wine on the world stage. This rich ampelographic heritage constitutes a strength by offering unique products not found elsewhere.

Growing Expertise and Quality Improvements: Although Turkey's wine industry was relatively undeveloped through much of the 20th century, the past few decades have seen significant improvements in wine quality and industry know-how. After the privatization of state monopoly Tekel (which had dominated alcohol production until the 1990s), numerous boutique wineries emerged, bringing innovation and investment in modern winemaking techniques (Buzrul, 2012). International collaborations and flying winemakers have further elevated expertise. Kavaklıdere, Doluca, and other leading wineries have won international awards, demonstrating that Turkish wines can meet global quality standards (Özdemir & Schmidbauer, 2023). The tastes of Turkish wine consumers, especially in urban centers, have also become more sophisticated in recent years due to greater exposure to global wine culture (Seyedimany & Koksal, 2022). This push toward higher quality and branding is gradually turning Turkey's wine into a premium artisanal product, which is a strength in targeting niche markets.

Strategic Geographic Location: Turkey's transcontinental position—spanning both Europe and Asia—provides significant advantages for its wine industry, impacting not only trade and tourism but also viticultural production. Vineyards are distributed across diverse regions, including Thrace, the Aegean coast, Central Anatolia, and Eastern Turkey, each possessing unique climatic conditions and soil characteristics (Diler, Şenol, & Aydınoğlu, 2015; Ozay, Akyol, & Azabagaoglu, 2005). This geographic and climatic diversity enables the cultivation of a wide variety of indigenous and international grape types, supporting the production of an extensive range of wine styles (Sabir et al., 2017; Tosun & Yılmaz, 2023). The broad distribution of vineyard areas across different altitudes and climates extends the harvest window, allowing for staggered harvesting and better management of production risks, such as weather variability or disease outbreaks (Kiracı & Şenol, 2017; Ribeiro et al., 2020).

Moreover, Turkey's proximity to major European and Middle Eastern markets facilitates logistical efficiency and export potential (Uysal et al., 2016). The country's robust tourism sector, which attracts millions of visitors annually, serves as an important driver for both wine marketing and local consumption, as domestic and international tourists increasingly seek out regional wine experiences at hotels, resorts, and restaurants (Ribeiro et al., 2020; Evered & Evered, 2016). The integration of wine with gastronomic and cultural tourism not only leverages these geographic and cultural advantages but also encourages continued investment and innovation in production, further strengthening the sector's competitive position (Karaoğlu, 2007; Chaudhry, 2024).

Supportive Institutional Knowledge (Historically): Historically, the early Republican era leadership (1920s–1930s) recognized wine as an agricultural value-added sector and took steps to develop it. The formation of Tekel in 1927 brought vineyards under organized cultivation and established wine factories, laying an industrial foundation (Yurtoğlu, 2019). Even though Tekel's monopoly sometimes stifled competition, it also preserved viticultural knowledge and infrastructure through the 20th century. Research institutes (e.g., Ankara's research vineyards, Tekirdağ Viticulture Research Institute) have long worked on grape breeding and pest management, contributing to a knowledge base. Turkey's membership in the International Organisation of Vine and Wine (OIV) since 2007 further indicates engagement with global best practices (Karaoğlu, 2007). These institutional linkages and historical efforts form an intangible strength – a base of experience and data on which current vintners can build.

In summary, Turkey's wine sector benefits from strong inherent advantages: favorable terroir, a wealth of unique grape varieties, an ancient wine culture, improving quality and expertise, and a strategic location bridging markets. These strengths give the industry a competitive foundation and distinct identity that, if leveraged, can help Turkey differentiate itself in the global wine market.

3.3.2 Weaknesses

Despite its strengths, the Turkish wine industry is hampered by significant weaknesses that limit its current competitiveness and growth. Many of these are internal or structural issues within the industry and domestic market:

Limited Domestic Market & Low Wine Consumption: A fundamental weakness is the small size of the domestic wine consumer base. Per capita wine consumption in Turkey is among the lowest of all wine-producing countries, due to a mix of cultural, religious, and economic factors (Senuyar, Demirbaş, & Saygın, 2014). While exact figures vary, studies consistently show that Turks consume very little wine annually compared to Europeans. For instance, Senuyar et al. (2014, p.9) report that Turkish wine production and consumption lag far behind global averages, with the country "dropping behind the world average" in wine consumption and marketing. Culturally, the majority Muslim population does not traditionally include wine in daily life, and many abstain from alcohol entirely for religious reasons (Senuyar et al., 2014). Even among drinkers, beer and the anise-flavored spirit rakı have historically been preferred over wine. This limited domestic demand is a critical weakness: it means wineries have a shallow home market and struggle to achieve economies of scale. The tastes of Turkish consumers are only slowly changing – primarily in cosmopolitan cities – but overall low demand makes it hard for the industry to flourish internally (Evered & Evered, 2016).

Fragmented Production and Scale Inefficiencies: The structure of Turkey's viticulture is fragmented and suboptimal for wine production. A very large share of Turkey's grapes are used for table grapes or raisins, not winemaking (Ozay et al., 2005; Kiracı & Şenol, 2017). Historically, viticulture policy and farmer preferences favored quantity (for eating or drying grapes) over developing quality wine grapes. As a result, the varieties and vineyard practices suitable for fine wine have been limited. Ozay et al. (2005, p. 113) highlight that the quality and quantity of wine grape varieties in Turkey are "not as one would expect from a land with such a mild climate," pointing to a misalignment between natural potential and actual grape outputs. Many vineyards growing wine grapes are small, family-owned plots with limited mechanization, leading to inconsistent quality and yields. On the production side, the winery sector is polarized between a few large companies and many tiny boutique producers. The largest two or three wineries account for a substantial portion of legal wine production, while dozens of micro-wineries produce very small volumes. This fragmentation can be a weakness because smaller wineries face high per-unit costs and difficulty in distribution, whereas the big players may lack incentives for innovation due to their semi-dominant positions. Economies of scale are hard to achieve; for example, Kızılaslan and Elmalı (2012, p.98) showed that grape growers in Tokat had thin profit margins due to high input costs and lack of scale, which translates into higher raw material costs for wine producers. The absence of cooperatives or effective clustering among growers and wineries means each actor operates in isolation, often inefficiently.

Inadequate Infrastructure and Distribution Channels: Another weakness lies in the post-harvest and distribution infrastructure for wine. Especially in emerging wine regions, there is a shortage of modern facilities such as temperature-controlled storage, efficient logistics for moving grapes and wine, and quality retail channels. Kızılaslan and Elmalı (2012, p. 100) noted that in Tokat, for instance, the lack of cold storage and proper packaging facilities led to product and quality losses, hindering market development. Distribution of wine within Turkey is also constrained – the number of licensed alcohol retailers is limited by law, and many smaller cities have few or no wine shops. This makes it difficult for producers to reach consumers outside of major urban or tourist centers. The weakness in distribution is compounded by the advertising ban: consumers have limited awareness of Turkish wines, and wineries must rely on word-of-mouth or on-premise sales (e.g., restaurants, wineries' own tasting rooms) to sell their product. All these factors create inefficiencies and reduce the competitiveness of Turkish wine on price and availability.

Insufficient R&D and Enological Training: While Turkey has agricultural research stations for grapes, there is relatively little dedicated research and development focusing on enology (winemaking science) and innovative viticulture compared to leading wine-producing countries. Few universities offer comprehensive enology programs, meaning a shortage of formally trained winemakers and viticulturists in the industry (Buzrul, 2012). Many winery owners or technical staff have had to self-train or learn on the job. This can be seen as a weakness in human capital – though some talented winemakers exist, the overall industry knowledge base is thin. Similarly, quality control mechanisms (such as appellation systems or certification of origin/quality) are in infancy, limiting the ability to build a strong "Turkish wine" brand associated with consistent standards.

Socio-political Stigma and Uncertain Policy Support: Underlying several of these weaknesses is the socio-political context: the wine industry does not enjoy broad support from the government or a large segment of society. Evered and Evered (2016, p. 75) describe how alcohol in Turkey remains a contentious issue tangled in secular versus religious debates. The political leadership in recent years has espoused conservative views on alcohol, framing high taxes and strict laws as measures to protect public health and morals (Buyrukoğlu et al., 2016). This means the industry operates in a climate of uncertainty and often finds itself at odds with regulators. There is little in the way of government subsidies or promotional programs for wine (unlike for other agricultural products), and occasional public rhetoric even vilifies alcohol consumption. Such a climate can discourage investment and long-term planning – a structural weakness in the business environment. Moreover, the social stigma around alcohol in more conservative communities can limit the spread of wine culture domestically. Wineries face difficulties organizing wine events or tastings in many regions due to local opposition or legal hurdles, impeding the development of a vibrant wine culture that could otherwise drive demand.

Demographic Challenges in Winegrowing: Turkey's grape farming community is aging, and younger generations are often reluctant to continue farming vineyards. Ayaz (2024, p. 112) provides a case study of a winegrowing village where an "aging community" and economic unpredictability led many to uproot vineyards or switch to other crops (such as olives) for steadier income. This trend, observed in various parts of Turkey, represents a weakness: the viticulture labour force and traditional knowledge are diminishing as rural youth migrate to urban jobs. Unless viticulture is made more attractive financially, the industry could face a shortage of skilled growers and a decline in vineyard area, directly weakening the upstream supply of quality grapes.

In summary, Turkey's wine industry is undermined by significant internal weaknesses: a constrained domestic market, punitive taxes and regulations, fragmented and inefficient production structures, underdeveloped infrastructure, limited skilled manpower, and a fraught socio-political environment. These weaknesses hinder the full realization of Turkey's wine potential and leave the industry vulnerable and underperforming relative to its inherent strengths.

3.3.3 Opportunities

While challenges abound, the changing landscape also presents several opportunities for the Turkish wine industry to harness its strengths and grow. These opportunities arise from external market trends, evolving consumer behaviours, and potential strategic initiatives:

Wine Tourism and Experiential Marketing: One of the most promising opportunities is the development of wine tourism. Turkey's rich winemaking heritage and scenic vineyard regions can attract both domestic and international tourists for wine-themed experiences. Ribeiro, Cihanger Ribeiro, and Santos Duarte (2020, p. 1723) note a growing interest in wine tourism in Turkey in recent years, describing it as a "unique opportunity to enhance the connection between ancient wine history and the promotion of Turkey as a wine destination." Wine routes and vineyard tours – for example, in Thrace or Cappadocia – allow tourists to discover Turkish wines in situ. This not only creates an additional revenue stream for wineries (through tasting fees, direct sales, and hospitality services) but also helps build brand recognition and a wine culture. The success of wine tourism in neighbouring countries (like Greece or Georgia) suggests Turkey could similarly leverage its historical appeal and beautiful wine regions. Linking wine with cultural tourism (archaeological sites, culinary experiences, festivals) can amplify the impact. As global tourism rebounds and travellers seek authentic experiences, Turkey's wine heritage is an asset waiting to be capitalized upon.

Export Markets and Niche Positioning: Despite the small domestic market, there is opportunity for Turkish wine in international markets, especially if positioned in niche segments. Uysal et al. (2016, p. 89) analyzed Turkey's competitiveness in the EU wine market and found that while overall share is low, Turkish wines have competitive potential in certain countries (for instance, some Turkish wines have found a footing in Germany, leveraging diaspora and exotic appeal). The global wine trade is open to new entrants, particularly with unique products. Turkish wineries can target niche markets by emphasizing indigenous varieties and organic or natural wine production. The current global trend toward discovering "new" wine regions and unique tastes works in Turkey's favour. For example, varietals like Narince (an aromatic white) or Kalecik Karası (a delicate red) could carve out specialty niches among sommeliers and wine enthusiasts abroad. International recognition, though modest so far, has been growing – Turkish wines have begun earning medals in global competitions, which can be leveraged to enter premium segments overseas. An industry report by Chaudhry (2024, p. 42) provides a "blueprint" for identifying and capitalizing on such opportunities, suggesting that aligning with international quality standards and storytelling about heritage can boost export prospects. Furthermore, free trade agreements or reduced tariffs with certain countries could open new export channels if pursued by policymakers, making Turkish wine more price-competitive abroad.

Changing Demographics and Consumer Preferences: Changing demographics and consumer preferences in Turkey's wine industry are reshaping the market. Demographic shifts—notably a younger, urban, and more educated population—have created a cohort of consumers with cosmopolitan attitudes who are far more open to wine than previous generations (Evered & Evered, 2016; Senuyar, Demirbaş, & Saygın, 2014). This nascent wine culture has been blooming in recent years, driven by cultural and generational change (Özdemir & Schmidbauer, 2023). As education levels and international exposure rise, wine is increasingly perceived as a fashionable and aspirational drink among Turkey's growing middle class (Evered & Evered, 2016; Seyedimany & Köksal, 2022). For instance, Millennials often view wine as conveying sophistication and social status (Özdemir & Schmidbauer, 2023). Empirical research supports these trends: Seyedimany and Köksal (2022) segmented Turkish wine consumers by generational cohorts and found significant differences in preferences and behaviours across age groups. Younger cohorts, such as Millennials and Gen Z, are more experimental in trying new wine styles and tend to consume wine in social settings (bars, restaurants) to a greater extent than their elders (Koksal & Seyedimany, 2023; Özdemir & Schmidbauer, 2023). In contrast, older generations remain more conservative in their wine consumption habits (Seyedimany & Köksal, 2022). Urbanization is a key factor in this shift: the majority of alcohol consumption in Turkey occurs in large cities and tourist centers where Western cultural influence is stronger, whereas conservative attitudes in rural areas have traditionally limited wine demand (Senuyar et al., 2014; Evered & Evered, 2016). Socio-economic variables play an important role as well—household data indicate that higher income and education levels strongly correlate with alcohol, and by extension, wine consumption (Gümüş & Gümüş, 2008).

Recent studies emphasize these dynamics: market analyses highlight generational, cultural, and attitudinal factors as key determinants of wine consumption preferences (Özdemir & Schmidbauer, 2023), and new segmentation research has identified emerging consumer groups beyond just age. Koksal and Seyedimany (2023), for example, classified Turkish wine consumers based on involvement level, uncovering a niche segment of highly involved "wine enthusiasts." Although this enthusiast segment is relatively small, its members actively seek out quality and local boutique wines and can serve as opinion leaders, helping to spread wine culture despite the country's historically limited wine-drinking traditions (Koksal & Seyedimany, 2023; Evered & Evered, 2016). Altogether, Turkey's evolving demographics suggest considerable potential to broaden the domestic wine consumer base. Even a modest increase in per capita wine consumption—currently around 1–1.3 liters per person annually, one of the lowest levels globally—would represent a significant boost in demand (Senuyar et al., 2014; Özdemir & Schmidbauer, 2023), illustrating the high stakes of engaging the new generation of Turkish wine consumers.

Product Diversification and Premiumization: Opportunities exist to diversify product offerings and move up the value chain. Currently, a considerable volume of Turkey's grape output goes into non-wine uses. By diverting a portion of quality grapes to winemaking, Turkey could increase wine production without expanding vineyard area. Some wineries have started experimenting with traditional methods (e.g., amphora aging, organic viticulture) to create premium, story-rich wines that command higher prices. The trend in the global market toward organic, biodynamic, and "natural" wines is an opportunity for Turkey, as its largely low-intervention traditional vineyards could be marketed under these categories. "Orange wines" (white wines made with skin contact) and other novel styles align well with certain indigenous varieties and have a growing following worldwide. By innovating and not just emulating international varietals, Turkish producers can differentiate their portfolio.

Potential Policy Shifts or Support: Although government policy has been a headwind, there is always the opportunity (or hope) for a more supportive policy environment in the future. If economic considerations prompt Turkey to boost agricultural exports, wine could be identified as a value-added export product worth promoting (Karaoğlu, 2007). For instance, easing tax burdens slightly or providing export incentives (as Turkey has done for other food products) would immediately improve profitability and competitiveness. Additionally, local administrations in wine-growing regions have opportunities to support the sector – some have started doing so by organizing wine festivals and enotourism initiatives semi-independently. Any relaxation in advertising laws (even indirect promotion through tourism boards) or greater inclusion of wine in gastronomy promotion would be beneficial. While such changes are uncertain, the long-term opportunity remains that as Turkey's political climate evolves, the stance on the wine industry could soften, unlocking latent growth.

Leveraging International Alliances and Knowledge Transfer: Turkish vintners can increasingly tap into international networks for knowledge and partnership (Anderson & Pinilla, 2018). There is opportunity to participate in EU-funded agricultural programs, OIV research projects, and international winemaker exchanges to upgrade skills (OIV, 2023). Joint ventures with foreign winemakers or investors (some boutique wineries already have European partners) can bring capital and expertise (Ribeiro, Cihanger Ribeiro, & Santos Duarte, 2020). As the global wine community becomes more interconnected, Turkey's unique position can attract oenologists and experts interested in working with its native grapes (Sabir et al., 2017). This global interest is an opportunity to accelerate learning and innovation domestically. For example, collaborative research on phylloxera-resistant rootstocks or climate change adaptation in vineyards can help Turkey prepare for future challenges while improving current practices (Tosun & Yılmaz, 2023).

Growing Global Demand for New Wine Origins: Lastly, global wine consumers—especially the adventurous younger consumers and professionals—are increasingly seeking out wines from lesser-known origins for novelty and discovery. This "neophilia" trend is an opportunity for Turkish wine (Forbes, 2018; Anderson & Pinilla, 2018). Just as wines from Lebanon, Israel, or Georgia have garnered intrigue on fine wine lists abroad, Turkish wines can ride the wave of curiosity for Eastern Mediterranean terroirs (Anderson & Pinilla, 2018). The story of Turkey as an ancient yet re-emerging wine country is compelling for marketing. If effectively told and backed by quality, it can secure a niche in high-end restaurants and wine shops internationally (Ribeiro et al., 2020). Turkish embassies, cultural institutes, and trade missions can also play a role by featuring Turkish wines at events, subtly circumventing the lack of advertising by using cultural diplomacy to raise profile (Forbes, 2018).

In summary, opportunities for Turkey's wine industry include capitalizing on tourism, targeting export niches, engaging a new generation of domestic consumers, diversifying and preimmunizing products, and possibly benefiting from improved policies or international collaboration. By seizing these opportunities, Turkish wine producers could overcome some internal limitations and extend their reach, turning the country's latent advantages into realized gains (Anderson & Pinilla, 2018; OIV, 2023).

3.3.4 Threats

The external environment presents several serious threats that could impede or even reverse the gains of Turkey's wine industry if not managed. These threats stem from socio-political dynamics, economic trends, and global factors largely outside the direct control of industry players:

High Taxation, Restrictive Regulations, and Political Risk: High taxation and restrictive regulations imposed by the Turkish government represent one of the most significant external threats to the country's wine industry. The government applies extremely high special consumption taxes (ÖTV) on wine, which have been repeatedly increased over the past decade, causing wine prices to rise well beyond what most consumers can afford (Buyrukoğlu, Bozdoğan, & Köktaş, 2016; Koç & Koç, 2020). In addition to these taxes, strict laws ban alcohol advertising and sponsorships and impose a burdensome licensing process for both producers and retailers. Since 2013, further bans on alcohol promotion in the media and at cultural events have made it even harder for wineries to expand their markets and educate consumers (Senuyar et al., 2014).

These regulatory pressures are compounded by the broader political climate, characterized in recent years by increasing conservatism and a tightening of alcohol-related policies. There is a persistent risk that taxes will continue to rise annually, often indexed to inflation, and that additional restrictive measures could be enacted—such as stricter licensing or further limitations on sales and advertising (Koç & Koç, 2020). As Evered and Evered (2016) note, the "alcohol question" in Turkey remains central to ongoing religious-secular tensions, making wine not merely a commodity but also a symbol in broader ideological debates. This situation creates an unpredictable policy environment that can be subject to political expediency. In a worst-case scenario, the industry could face quasi-prohibitionary conditions, where commercial viability becomes nearly impossible. Political instability, social unrest, or abrupt changes in government could further disrupt business operations, tourism, and investor confidence.

Overall, these regulatory and political pressures are outside the industry's direct control, stemming from the wider policy and socio-political environment. As such, they are best understood as external threats that continue to challenge the sector's competitiveness and future development (Evered & Evered, 2016).

Socio-political Stigma, Cultural Opposition, and Uncertain Policy Support: The Turkish wine industry faces significant external threats rooted in persistent socio-political stigma, cultural opposition, and unreliable policy support. Alcohol consumption remains a contentious issue in Turkish society, shaped by religious, cultural, and political debates (Evered & Evered, 2016). The government's generally conservative stance contributes to ongoing uncertainty in policy, with limited subsidies or promotional support for the wine sector and, at times, negative rhetoric in public discourse (Buyrukoğlu et al., 2016). Social stigma surrounding wine—particularly prevalent in more conservative communities—restricts the spread of wine culture, inhibits industry events and marketing, and discourages consumer engagement.

Alongside formal regulations, the industry contends with deeply ingrained social and cultural forces that threaten its "social license" to operate. Conservative segments of society often view alcohol negatively, leading to local resistance against new vineyards or wineries and social pressure on individuals not to engage in wine consumption. Community leaders in some areas have opposed wine festivals or attempted to enforce dry zones beyond what is required by national law (Erdinçli, 2020). The persistent religious framing of alcohol as haram (forbidden) means wine is unlikely to be broadly embraced in Turkish society to the extent seen in European cultures. This environment creates ongoing risk: any incident or controversy involving alcohol could be leveraged by anti-alcohol groups to further stigmatize wine and prompt stricter crackdowns.

These external pressures generate an unpredictable environment for investment and long-term planning, impeding the development of a vibrant wine culture and threatening the sector's future growth and stability.

Economic Volatility and Cost Pressures: Turkey’s macroeconomic environment has been volatile, with high inflation and currency fluctuations in recent years. This poses a threat to wineries on multiple fronts. High inflation drives up the cost of domestic inputs (labour, energy, packaging). More critically, a weak Turkish lira makes imported winemaking necessities – such as oak barrels, certain yeasts or lab equipment, and even high-quality bottles – much more expensive. Many producers rely on imported machinery and vineyard equipment; currency devaluation strains their finances and can lead to corners being cut on quality. Economic downturns also reduce consumers’ disposable incomes, which in a price-sensitive market like Turkey means people might further cut back on wine (already a luxury for many). Tosun and Yılmaz (2022, p. 4112) point out that factors like rising energy prices have impacted the availability and affordability of table wines. If Turkey’s economy faces crises, wine (as a non-essential good) tends to be hit hard by diminished spending. Additionally, high interest rates and limited credit availability can hinder the expansion plans of wineries or vineyards – making it hard to invest in growth. In short, the broader economic instability in Turkey is a threat that can disrupt the industry’s viability.

Climate Change and Environmental Challenges: Climate change is an emerging threat to viticulture globally, and Turkey is no exception (D’Amico et al., 2016; OIV, 2023; Tosun & Yılmaz, 2023). Rising temperatures, shifting precipitation patterns, and increased frequency of extreme weather (droughts, heatwaves, unexpected frosts or hail) can significantly impact grape yields and quality (D’Amico et al., 2016; OIV, 2023). Many of Turkey’s wine regions, such as the Aegean and Mediterranean coasts, are already prone to hot summers; further warming could stress vines, lead to overripens or water shortages, and force changes in vineyard practices (Tosun & Yılmaz, 2023). While specific studies on climate change impact in Turkish vineyards are still limited (indicating a literature gap), the threat is recognized at least qualitatively (OIV, 2023). Producers may need to adapt by changing varietals, altering canopy management, or investing in irrigation (Scienza & Boselli, 2019). Pests and diseases might also spread more easily with changing climate (Scienza & Boselli, 2019). Without proactive measures, climate change could reduce the consistency and quantity of wine grape harvests, threatening the industry’s supply base in the medium to long term (D’Amico et al., 2016; OIV, 2023).

Global Competition and Market Entry Barriers: On the international front, Turkish wines face intense competition from both established Old-World producers and aggressive New World exporters (Anderson & Pinilla, 2018; Özdemir & Schmidbauer, 2023). The global wine market is crowded; countries like Chile, South Africa, or Australia have been very successful in supplying affordable wines to price-sensitive import markets—the same segment Turkish wines might target (Anderson & Pinilla, 2018; OIV, 2023).

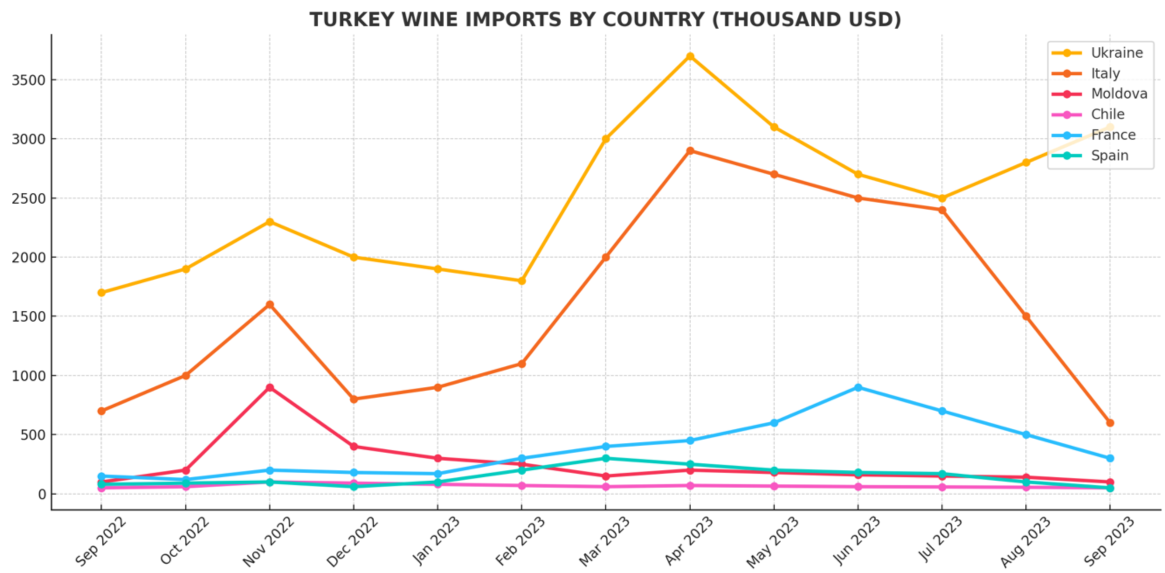

Figure 3. UN Comtrade (2023). Turkey: Wine - market analysis, forecast, size, trends, and insights.

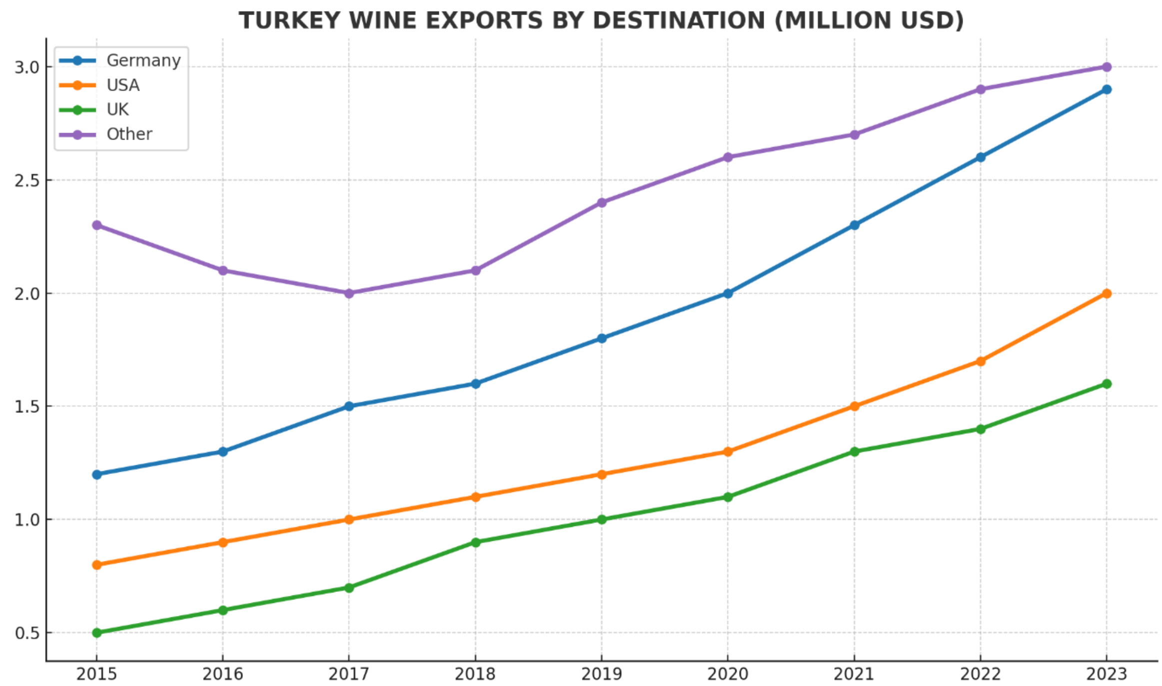

Figure 4. Organisation Internationale de la Vigne et du Vin (OIV), 2023; Turkish Exporters Assembly (TİM), 2022. Trends in Turkish wine exports by destination, 2015–2023.

With Turkey's production costs elevated by taxation and small scale, it struggles to compete on price abroad (Özdemir & Schmidbauer, 2023). In the premium segment, Turkey lacks the brand recognition and reputational cachet of regions like Napa or Bordeaux, making it difficult to convince importers and consumers to pay high prices for Turkish labels (Forbes, 2018; Ribeiro et al., 2020). Additionally, protectionist measures abroad can be a threat: for example, if the EU or other importers have quotas, tariffs, or stringent certification requirements, Turkish exporters might find market entry tough (OIV, 2023). Conversely, on the domestic side, if Turkey were to ever lower its high import tariffs on foreign wine (currently those tariffs indirectly protect local wine by keeping imports costly), the domestic market could be swamped by cheaper imported wines, given Turkish consumers' price sensitivity (Anderson & Pinilla, 2018). Thus, either maintaining export barriers or lowering import barriers could pose threats—a delicate balance in trade policy affects the industry.

Public Health Crises and External Shocks: The industry is also vulnerable to broader external shocks such as public health crises or global pandemics. The COVID-19 pandemic, for instance, severely affected tourism and hospitality, which are key channels for wine sales (OIV, 2023). Turkish wineries saw reduced sales when restaurants and hotels were closed or when travel restrictions kept tourists away (OIV, 2023). While such events are hopefully infrequent, the possibility remains. Similarly, any public health campaigns against alcohol (domestically or internationally) could diminish wine consumption (World Health Organization, 2022). For example, if new research or guidelines were publicized linking even moderate alcohol use to health risks, that might shift public sentiment and policy further against alcohol (World Health Organization, 2022). The industry must be cognizant that it operates in a product category exposed to health and ethical scrutiny, which can bring sudden regulatory changes (like warning labels or advertising clampdowns beyond what exists) (OIV, 2023).

Loss of Viticultural Areas to Competing Uses: Urbanization and the allure of alternative crops also threaten Turkey's vineyards (Ayaz, 2024). As cities expand, some vineyard lands (especially those near urban centers or coastal areas) face pressure from real estate development (Ayaz, 2024). Moreover, as seen in the "aging farmers" issue, vineyards might be replaced by other agricultural uses that are seen as more immediately profitable or less socially contentious (Ayaz, 2024). Ayaz (2024, p. 117) documented cases of vineyards being converted to olive groves or other crops. Once lost, vineyard land and longstanding vines are hard to reclaim. This gradual erosion of the vineyard area is a creeping threat that could lead to a decline in production capacity over time (Ayaz, 2024). Without policies to protect and incentivize maintaining vineyards, Turkey might inadvertently shrink its wine potential (Tosun & Yılmaz, 2023).

In summary, the Turkish wine industry faces substantial external threats: an antagonistic regulatory regime, cultural opposition, economic turbulence, environmental changes, fierce international competition, and unpredictable global events (Anderson & Pinilla, 2018; OIV, 2023; Özdemir & Schmidbauer, 2023). These threats have the potential to severely limit the industry's growth or even cause contraction unless strategies are developed to mitigate them. The juxtaposition of these threats with the previously outlined strengths, weaknesses, and opportunities sets the stage for strategic discussion on how the industry can survive and thrive.

3.4 Discussion: Strategic Synthesis and Gaps in the Literature

A strategic synthesis of the Turkish wine industry, informed by SWOT analysis, reveals a sector marked by significant competitive advantages alongside persistent structural and contextual challenges. The literature consistently identifies Turkey's deep-rooted winemaking heritage, extensive genetic diversity of grape varieties, favourable climatic conditions, and growing technical expertise as fundamental assets (Evered & Evered, 2016; Diler, Şenol, & Aydınoğlu, 2015; Sabir et al., 2017). These strengths correspond with several elements of national competitive advantage outlined in Porter's framework, notably in factor conditions and related supporting industries (Porter, 1990). However, the realization of this potential is constrained by well-documented internal weaknesses, such as limited domestic demand and a fragmented production structure, and further hindered by external threats, including stringent regulatory barriers and socio-political opposition (Koç & Koç, 2020; Buyrukoğlu, Bozdoğan, & Köktaş, 2016; Evered & Evered, 2016).

The reviewed literature suggests that the future trajectory of Turkey's wine industry will depend largely on the capacity to leverage its inherent strengths and emerging opportunities to address these longstanding challenges. For example, the strategic utilization of unique indigenous grape varieties and historical narratives may be effective in developing wine tourism and export markets, which can partially offset the constraints of a small domestic consumer base (Ribeiro et al., 2020; Özdemir & Schmidbauer, 2023). Several scholars argue that reforms in government policy, particularly regarding taxation and industry support, could significantly enhance the sector's competitiveness; Özdemir and Schmidbauer (2023, p. 8) specifically contend that a more supportive regulatory environment would allow Turkey to reclaim a prominent position among Old World wine producers. The literature thus indicates a need for coordinated industry strategy and policy advocacy that reconceptualizes wine as both a value-added agricultural product and a component of cultural heritage.

Market differentiation emerges as a recurring strategic theme. Multiple studies emphasize that Turkey is unlikely to compete globally on price or volume, and instead should focus on differentiation through authenticity, indigenous varietals, and quality (Evered & Evered, 2016; Ribeiro et al., 2020). The integration of organic production methods and experiential tourism is identified as a potential avenue for niche market development. This approach is further supported by research on domestic consumer preferences, which points to a growing interest among younger and more cosmopolitan demographics in authentic, locally rooted wine products (Seyedimany & Köksal, 2022).

Another strategic consideration relates to collaboration and industry clustering. Addressing weaknesses such as production fragmentation and limited economies of scale may be possible through greater cooperation among producers and regional associations. Tosun and Yılmaz (2023, p. 84) discuss the potential for region-specific strategies informed by existing economic and social clusters, such as leveraging Thrace's cross-border ties or the Aegean's specialization in aromatic whites. Cooperative initiatives, including regional wine associations and joint marketing, are cited as mechanisms to enhance quality, build collective brands, and increase competitiveness, mirroring successful models in other wine-producing countries.

Despite these insights, the literature reveals several notable gaps that have yet to be fully addressed. While economic and regulatory challenges are relatively well-documented, empirical research on consumer behavior and marketing effectiveness in Turkey remains limited. Studies by Seyedimany and Köksal (2022, p. 252) and Koksal and Seyedimany (2023, p. 198) have begun to segment Turkish wine consumers, yet there is a need for more detailed analyses quantifying preferences, willingness to pay, and effective marketing approaches. Research on the impacts of climate change and the adoption of sustainable viticultural practices is also scarce, despite growing environmental pressures. Comparative policy analysis is underdeveloped, with few studies examining how Turkey's regulatory framework compares to that of other wine-producing countries with similar socio-religious contexts, such as Lebanon or Morocco. Additionally, the literature on supply chain efficiency, distribution logistics, and post-harvest management is fragmented, often relying on anecdotal evidence rather than systematic study (Kızılaslan & Elmalı, 2012).

Future research should address these areas by employing interdisciplinary methods and comparative case studies, which can offer more prescriptive guidance for both policymakers and industry stakeholders. Evidence-based strategies are needed in areas such as tourism development, export market identification, consumer education, and supply chain optimization.

In summary, Turkey’s wine industry displays considerable latent potential rooted in its history, geography, and biodiversity. Realizing this potential will require overcoming structural weaknesses and mitigating external threats through targeted strategies and supportive policy interventions. The literature to date provides a comprehensive SWOT mapping but highlights the need for deeper, model-driven, and comparative research to inform strategic planning and sectoral development.

3.5 Comparative Benchmarking: Turkey and Italy’s Wine Industries

Having established a comprehensive understanding of Turkey’s wine industry through the preceding literature review and SWOT analysis, it is valuable to benchmark Turkey’s position against another prominent wine-producing country. Italy, as one of the world’s leading Old World wine producers, provides an instructive point of comparison—both for its historical evolution and for its experience in addressing many of the challenges identified in the Turkish context. This comparative approach, grounded in the themes and analytical frameworks previously discussed, enables a deeper assessment of Turkey’s relative strengths, weaknesses, and strategic opportunities. The following section integrates insights from the earlier review with comparative data and literature on the Italian wine industry, in order to highlight key similarities, differences, and lessons that may inform future policy and development strategies for Turkey.

	Turkey	Italy
Regulatory Framework	High taxation; restrictive advertising laws; weak institutional support	Structured DOC/DOCG framework; EU-aligned regulations
Domestic Consumption (liters/capita) [1]	1.0–1.3 liters	35–45 liters
Export Volume & Reach	Limited; niche markets abroad; high barriers	Extensive global exports; strong market penetration
Labeling and Certification	No national certification (e.g., DOC); informal regional labels	Well-established DOC/DOCG system; traceability standards

Wine Tourism Development	Emerging; concentrated in a few regions (e.g., Thrace, Cappadocia)	Highly developed; core part of rural tourism economy
Brand Recognition	Low international recognition	Strong global brand equity
Government Support	Minimal subsidies; regulatory obstacles dominate	Substantial support through CAP, tourism integration
Industry Clustering/Cooperatives	Fragmented production; weak coordination	Strong regional cooperatives and consortia
Climate Adaptation Measures	Limited studies; minimal implementation	Advanced R&D and proactive regional strategies
Indigenous Grape Varieties Usage	Rich diversity; underutilized; boutique wineries reviving heritage grapes	Extensively used; integrated into DOC/G system and marketing
Consumer Culture and Wine Perception	Emerging wine culture; concentrated in urban, educated populations	Strong cultural integration of wine; common across all demographics
Education and Enological Training	Limited enology programs; on-the-job learning common	Well-developed education infrastructure; enology schools and vocational training
Access to Finance and Investment Climate	Economic volatility; limited credit; few state incentives	Stable investment climate; EU and regional development funding available

Table 3: Benchmark Comparison of Turkey and Italy's Wine Industries by Key Dimensions

[1] Based on 2021–2022 data from the International Organisation of Vine and Wine (OIV, 2023).

3.5.1 Regulatory and Institutional Framework

Italy’s wine industry operates within a mature regulatory and institutional framework that has evolved over decades to support quality and competitiveness. Italy established its Denominazione di Origine Controllata (DOC) system in the 1960s and today counts over 500 wine appellations under Protected Designation of Origin (PDO) or Protected Geographical Indication (PGI) status (Statista, 2023).

Figure 3. Italian Wine Classification Labels: DOCG, DOC, and IGT. Source: Avvenice, n.d.; European Commission, 2024.

This appellation system, now integrated with European Union wine regulations, protects regional names and enforces production standards, thereby safeguarding wine quality and authenticity. Italian wine producers also benefit from strong industry institutions and policies – for example, consortia of growers and wineries in each region manage and promote their DOC/PDO wines, and government agencies (aided by EU Common Agricultural Policy funds) provide support for vineyard improvements, research, and international marketing. The regulatory environment in Italy is fundamentally supportive, with moderate taxation and clear quality norms, reflecting wine’s accepted role in the economy and culture.

Figure 4. European Union Quality Designations: DOP and IGP. Source: Avvenice, n.d.; European Commission, 2024.

Turkey's regulatory and institutional context, by contrast, has historically been more restrictive and underdeveloped for wine. For much of the 20th century, Turkey's alcohol sector was controlled by a state monopoly (Tekel) which limited private enterprise in winemaking (O'Brien, 2021). The privatization of Tekel in 2003 opened the door for numerous boutique wineries to emerge, increasing the number of licensed producers from fewer than 50 two decades ago to around 150–180 today (O'Brien, 2021). However, the policy environment since the 2000s has posed significant challenges. Heavy excise taxes on wine and other alcoholic beverages (Özdemir & Schmidbauer, 2023) have driven up prices and squeezed profit margins. In fact, Turkey's Special Consumption Tax on alcohol has been raised repeatedly (e.g. a 17% hike in 2021), and by 2020 alcohol/tobacco taxes constituted 12% of government tax revenue – indicative of the fiscal burden placed on the sector (O'Brien, 2021). Beyond taxation, strict legal restrictions reflect a cautious or even adverse stance of the government toward alcohol: since 2013, all alcohol advertising and sponsorship is banned, retail sales are prohibited at night and near mosques, and other bureaucratic hurdles have increased (Evered & Evered, 2016; O'Brien, 2021). These measures, often justified by authorities as public health or moral initiatives, have nonetheless hampered the wine industry's growth by curtailing domestic marketing and consumer outreach.

Another institutional gap in Turkey is the lack of an effective Geographical Indication system for wine. Whereas Italy (and other Old World producers) long ago implemented legal frameworks to protect wine origin (e.g., Italy's dozens of DOC/G regions), Turkey still lacks a comprehensive GI regime for wine (Tosun & Yılmaz, 2023). As of mid-2020s, there are no widely adopted appellation designations for Turkey's wine regions, meaning Turkish producers cannot easily leverage regional names or "terroir" in marketing their wines (Vannoy, 2023). This is a notable disadvantage in the global marketplace where origin and authenticity are key selling points – for instance, neighbouring Greece has well over 100 protected wine indications, while Turkey has virtually none (Vannoy, 2023). On a positive note, Turkey has aligned some intellectual property laws with EU standards and has started registering geographical indications for various agro-products, but wine has seen little progress on this front (Tosun & Yılmaz, 2023). The absence of formal regional wine classifications, coupled with minimal government promotion, places Turkish producers at a branding and legal disadvantage compared to their Italian counterparts.

In 2025, the indigenous Adakarası grape from Avşa Island received Protected Geographical Indication (PGI) status under Turkey's national geographical indication system (Turkish Patent and Trademark Office [TürkPatent], 2025). While this designation is not yet recognized at the EU level, it marks a foundational step toward future alignment with European wine quality schemes such as PDO and PGI, which require prior national protection before EU-level application (European Commission, 2024). As of this writing, Turkey still has no wine products registered in the EU's eAmbrosia database (European Commission, 2025). However, the formal domestic recognition of Adakarası sets an important precedent for other indigenous varieties and regional producers seeking international legitimacy and branding advantage.

In summary, Italy's experience demonstrates the value of a supportive regulatory framework: clear quality standards (DOC/PDO), collective industry bodies, and government backing (including subsidy programs and export promotions) have fostered a globally competitive wine sector. Turkey, on the other hand, illustrates how regulatory barriers – high taxes, advertising bans, weak GI protection – can limit an industry's potential. Turkey's wine producers operate in a policy environment that is more punitive than promotional, influenced in part by religious-cultural sensitivities (Evered & Evered,

2016) and a legacy of state control. This contrast suggests that reforming domestic policies (e.g. instituting wine appellations, reducing excise tax burdens, and enabling better marketing) could create more favorable conditions for Turkey's wine industry to thrive, as evidenced by Italy's institutional model.

3.5.2 Domestic Market and Consumption Patterns

Domestic consumption patterns and market dynamics in Italy and Turkey differ dramatically, reflecting each country's culture and relationship with wine. In Italy, wine is a staple of daily life and meals – a cultural norm that translates into a high level of domestic consumption. Per capita wine consumption in Italy is around 40 liters per year in recent years (Statista, 2023), among the highest in the world. Despite a long-term decline from mid-20th-century peaks (when Italians drank even more wine), Italy remains one of the largest domestic wine markets globally with an estimated 23 million hectoliters consumed in 2022 (OIV, 2023). This robust internal demand provides a broad base for Italian producers: a large, educated consumer population that appreciates wine styles at all price points, from everyday table wines to fine DOCG labels. The Italian market's size and maturity encourage competition and innovation among producers and sustain thousands of wineries economically. Wine in Italy is also relatively affordable and accessible, aided by moderate taxation and widespread availability in restaurants and retail, reinforcing its position as an integral component of Italian food culture.

Turkey's domestic wine market, by contrast, is small and niche, constrained by cultural, religious, and economic factors. With a majority Muslim population, a significant segment of Turkish society abstains from alcohol, and wine has not historically been a ubiquitous part of daily dining for most people. Per capita wine consumption in Turkey is only on the order of 1–2 liters per year (Eren, 2024), exceedingly low by European standards and indicative of wine's limited role in the average Turkish consumer's lifestyle. Moreover, high retail prices due to taxes make wine comparatively expensive, further dampening mass consumption. As a result, Turkey's entire annual wine consumption and production are a tiny fraction of Italy's. For example, Turkey's total wine market volume in 2023 was about 725,000 hectoliters (including some imported wine), and this actually represented a decline of 14% from the prior year amid economic challenges (Eren, 2024). In essence, Turkey's domestic demand is not yet a reliable engine for growth – it is volatile and highly sensitive to broader economic conditions like inflation and currency depreciation (which in recent years have driven up local wine prices) (Eren, 2024).

One structural characteristic of Turkey's grape and wine market is that, despite the country's large vineyard area and grape output, very little of that translates into wine supply. Turkey is among the top five countries globally in vineyard acreage (around 400,000+ hectares of vines), yet only a small percentage of grapes (as low as 2–5%) is used for winemaking – the rest goes to table grapes, raisins, or distilled spirits (Senuyar et al., 2014; Akdemir & Candar, 2022). In contrast, countries like Italy or France channel the majority of their grape harvest into wine production (Senuyar et al., 2014). This disparity means the raw material base for Turkey's wine industry is limited both in quantity and quality: viticulture in Turkey has long been oriented toward eating grapes, not wine grapes, which restricts the volume of grapes available for vinification and often means wine producers struggle to obtain high-quality, wine-specific cultivars (Senuyar et al., 2014). Italy, on the other hand, grows a vast array of wine grape varieties across its regions specifically for vinification, ensuring a steady and suitable grape supply for its wineries.

The domestic market structure in Turkey is also characterized by a duopoly and informality. Two large companies (Kavaklıdere and Doluca) account for over half of Turkish wine production (O'Brien, 2021), dominating distribution in retail and restaurants. Meanwhile, many smaller boutique wineries serve local or direct-sale markets. Due to advertising restrictions, word-of-mouth, and on-site sales (e.g., winery visits, wine clubs) have become crucial for these small producers to reach consumers (O'Brien, 2021). Additionally, there is a noted presence of informal or unregistered wine production in Turkey, as some consumers and small-scale makers turn to homemade wine (or sourcing wine through unofficial channels) to avoid high taxes (Senuyar et al., 2014). This gray market further challenges licensed wineries by undercutting prices and complicating quality control and tax revenue. Italy's domestic market, in comparison, is largely formal and well-regulated; home winemaking exists but on a hobbyist scale and does not significantly detract from the commercial market which is well integrated (with wine available in virtually all supermarkets, restaurants, and specialty shops across the country).

In summary, Italy's domestic wine market is robust, culturally entrenched, and provides a strong foundation for its wine industry, whereas Turkey's domestic market remains limited and fragile. The Italian case shows how a large home market can support a diverse industry and act as a springboard for international success. Turkey's case highlights the challenges of developing an industry without a broad domestic consumer base – an issue exacerbated by external factors like restrictive laws and economic volatility. For Turkey, expanding and educating its domestic consumer base (for instance, by promoting moderate wine appreciation in cuisine and tourism) could be a strategic priority, drawing inspiration from Italy where domestic consumption underpins the entire wine value chain.

3.5.3 Branding, Reputation, and International Market Presence

Italy benefits a world-class reputation in the wine industry, built on centuries of winemaking heritage and strong nation-branding. "Made in Italy" is itself a mark of quality in wine, as Italian wines have long been prominent on the global stage alongside those of France and Spain. Italy's diverse regions – from Tuscany and Piedmont to Veneto and Sicily – each have iconic wine styles with well-developed identities (e.g., Chianti Classico, Barolo, Prosecco, Brunello di Montalcino). The country leverages its rich storytelling and traditions in branding: appellation labels (DOC, DOCG) signal to consumers a guarantee of origin and typicity, and many Italian wineries emphasize historical lineage (some are family-run for generations) as part of their brand narrative. Italy is consistently one of the top two wine-exporting nations by volume and value. In 2021, for example, Italy accounted for roughly 19% of global wine production and a similarly significant share of world exports (OIV, 2022). Italian wine exports span the full spectrum from premium to mass-market, reaching over 100 countries, with strong footholds in key markets like the EU, North America, and Asia. The international presence of Italian wine is further bolstered by government and industry initiatives such as trade fairs (e.g., Vinitaly), promotional campaigns in emerging markets, and collective branding efforts by consortia. As a result, Italian wines are not only widely available worldwide but often associated with quality, authenticity, and lifestyle (the pairing of Italian wine with its famed cuisine enhances this reputation).

Turkey's wine industry, in contrast, has a minimal international profile. Turkish wines are rarely found on store shelves or wine lists outside of Turkey, except perhaps in specialty shops or Turkish restaurants abroad (O'Brien, 2021; Eren, 2024). In export terms, Turkey ranks only around 50th globally; for example, Turkey's total wine exports in 2022 were about $13–14 million (Eren, 2024), a negligible figure compared to Italy's multi-billion euro exports (OIV, 2023). The volume of Turkish wine exported constitutes only a small percentage of domestic production (O'Brien, 2021). This low export presence is not only due to limited overall production—Turkey's entire annual wine output is roughly equivalent to that of a medium-sized Italian region (OIV, 2023)—but also reflects challenges in branding and international market recognition (Özdemir & Schmidbauer, 2023). International consumers generally lack awareness of Turkey as a wine-producing country, and there are few established regional brands or distinctive Turkish wine styles known globally (Ribeiro, Cihanger Ribeiro, & Santos Duarte, 2020). While Turkey boasts dozens of unique indigenous grape varieties (such as Kalecik Karası, Öküzgözü, Boğazkere, and Narince), these names do not yet resonate in export markets as Italian grape varieties or wine regions do (Sabir et al., 2017). As a result, many Turkish wineries use international grape varieties like Cabernet Sauvignon or Merlot in their blends to appeal to international judges or consumers, but this can lead to less differentiation in a crowded global market (Özdemir & Schmidbauer, 2023).

Several factors have hindered Turkey's ability to build a wine brand internationally. First, the absence of a GI/appellation framework means Turkish wines cannot easily market a protected regional identity (Tosun & Yılmaz, 2023). For example, an Italian wine can proudly label itself as "Barolo DOCG" which immediately tells connoisseurs about its origin and standards, whereas a Turkish wine from, say, Cappadocia can only describe itself in general terms since there's no official appellation – diminishing its distinctiveness. Second, domestic legal constraints indirectly impact international branding: the ban on alcohol advertising in Turkey also limits wineries' visibility within Turkey, making it hard for them to even build a strong home brand that could be projected outward. Many Turkish producers, especially small ones, struggle to attain name recognition without the usual marketing channels, and thus have limited resources to promote abroad (O'Brien, 2021). By contrast, Italian wineries benefit from both domestic and international marketing opportunities, including government-backed promotions in foreign markets (Italian trade agencies often assist in showcasing Italian wines overseas).

That said, there have been some efforts by Turkish stakeholders to raise international awareness. The industry association Wines of Turkey was established to coordinate promotion and represent Turkish wines globally, organizing participation in international wine fairs and inviting foreign wine writers and experts to Turkish wine regions (Forbes, 2018). A handful of Turkish wines have earned awards in international competitions or garnered positive reviews in foreign press, helping to put Turkey on the radar in a modest way. And Turkey's rich winemaking heritage – being part of the ancient cradle of wine – is a compelling story that, if packaged well, could intrigue global consumers. For instance, emphasizing that Anatolia is one of the birthplaces of viticulture or that Turkey has hundreds of indigenous grape varieties is a narrative angle that a few quality-focused wineries use in branding. However, these remain individual efforts; there is not yet a cohesive country-level brand or widespread recognition.

In summary, Italy's wine industry sets a benchmark in branding and international presence, with strong regional brands and a deep penetration of global markets. Italy demonstrates how appellation systems, cultural cachet, and sustained promotion translate into international prestige and market share. Turkey's wine sector, meanwhile, is still in the early stages of establishing an identity beyond its borders. The comparative lesson here is that Turkey may benefit from developing collective branding strategies (perhaps modeling a Turkish appellation system and unified marketing initiatives after the Italian/French approach) and leveraging its unique attributes to differentiate its wines. Until such steps are taken, Turkish wine will likely remain a minor, obscure player internationally, whereas Italy will continue to serve as a prime example of how to successfully build a worldwide reputation in wine.

3.5.4 Wine Tourism and Cultural Integration

Wine tourism is a significant and well-integrated aspect of Italy's wine industry, whereas in Turkey it is an emerging opportunity that is not yet fully realized. In Italy, wine and tourism go hand in hand as part of the country's cultural allure (Santini et al., 2011; Croce & Perri, 2010). The country's picturesque vineyard landscapes—from the rolling hills of Tuscany and Umbria to the scenic Langhe and the vineyards along the Amalfi Coast—have long attracted travellers (Scienza & Boselli, 2019; UNESCO, 2014). Many of these areas are not only productive wine regions but are also celebrated cultural landscapes, with some (such as the vineyard hills of Piedmont and Veneto) designated as UNESCO World Heritage sites (UNESCO, 2014). Tourists flock to Italy for its food and wine experiences; for example, in

2019, it was estimated that 14 to 15 million tourist visits in Italy included a wine-related component—such as winery tours, tastings, or wine festivals—contributing over €2.5 billion in revenue (Statista, 2020; Santini et al., 2011). Wine tourism in Italy ranges from casual tastings at family-run wineries to structured "strade del vino" (wine routes), which are well developed in regions like Chianti and Prosecco (Croce & Perri, 2010). Additionally, events such as harvest festivals, winery agrturismi (farm stays), and eno-gastronomic fairs make wine a year-round attraction for domestic and international tourists (Scienza & Boselli, 2019). This integration of wine into the broader tourism sector has not only provided diversified income for Italian wineries—many of which rely on direct-to-consumer sales and hospitality services—but also reinforced wine's role as a central element of Italy's cultural identity (Santini et al., 2011; Croce & Perri, 2010).

In Turkey, wine tourism is a new but growing phenomenon, and it represents a promising avenue for development. Turkey is already one of the world's top overall tourism destinations, known for its rich history, archaeological sites, diverse landscapes, and cuisine. Building on this, certain regions in Turkey have begun to successfully combine cultural/historical tourism with wine experiences. For example, the region of Cappadocia, famous for its surreal cave dwellings and hot air balloon rides, also has ancient vineyard sites and a few wineries that offer tastings in volcanic rock-cut cellars – providing tourists a blend of history and wine. Similarly, Thrace (the European side of Turkey) has established a "Thrace Wine Route," capitalizing on its proximity to Istanbul and the region's concentration of vineyards and wineries. Along this route, visitors can tour vineyards, taste wines made from local grapes like Papaskarası or international varietals and enjoy rural hospitality. The Urla wine region near İzmir on the Aegean coast is another burgeoning enotourism hub; Urla wineries have developed elegant tasting rooms, restaurants, and small hotels, attracting domestic visitors and cruise tourists looking for an Aegean wine country experience. According to recent industry reports, wine tourism is indeed thriving in pockets of Turkey, with wineries in Thrace, Urla, and Cappadocia organizing regular tours, vineyard picnics, and cultural events for visitors (Eren, 2024). These efforts are often spearheaded by private entrepreneurs and wine associations, indicating a grassroots recognition of wine tourism's potential.

The rise of wine tourism in Turkey is also partly a strategic adaptation to local regulations: faced with advertising bans, Turkish wineries have turned to enotourism to directly reach consumers. By hosting guests on-site for tours and tastings, wineries create an intimate marketing channel that circumvents traditional media. For instance, some boutique wineries have opened restaurants or boutique hotels on their estates (O'Brien, 2021). This not only generates revenue but also builds brand loyalty through personal experience – an approach that Italian wineries have long utilized by welcoming visitors. One notable case is the Barbare Vineyard in Thrace, whose owners, after struggling with the advertisement ban, converted part of their vineyard estate into a country hotel and restaurant to draw visitors; by providing an immersive wine experience, they rely on word-of-mouth of satisfied tourists to build their reputation (O'Brien, 2021). Such examples echo Italian agritourism models, where rural estates offer lodging and tastings, reinforcing that experience-based marketing can be powerful for wineries.

Culturally, however, the integration of wine into Turkey's mainstream culture remains limited compared to Italy. In Italy, wine has a deep historical-cultural integration (tied to religion – wine in Catholic mass – and to social customs – the daily glass of wine with dinner). In Turkey, due to the dominant Islamic culture which traditionally frowns upon alcohol, wine does not hold the same social ubiquity. It is enjoyed by a subset of the population (often more urban, secular, and internationalized communities) and by foreign tourists, but it isn't a nationwide cultural symbol. Nonetheless, wine has long existed at the margins of Turkish culture (e.g., in regions with Christian heritage or in cosmopolitan Ottoman times), and today there is a conscious effort by some to reclaim wine as part of Turkey's diverse cultural tapestry. The publication of bilingual guides like The Oenotourism Guide to Turkey (Yankı & Gündoğan) and the inclusion of Turkish restaurants and wineries in international guides (like Michelin Guide recently recognizing some Turkish restaurants that highlight local wine) are small steps toward normalizing wine within Turkey's culinary identity (Eren, 2024).

In comparing the two countries, Italy exemplifies the economic and cultural benefits of embracing wine tourism and suggests a roadmap for Turkey. Italy's success shows that wine tourism can invigorate rural economies, preserve traditions, and enhance a country's image. Turkey, with its unique historical wine regions and strong overall tourism sector, stands to gain similar benefits if it continues to invest in this area. The creation of official wine routes, support for winery tourism infrastructure, and joint marketing of wine with Turkey's famed cuisine and historical sites could significantly boost the wine sector's visibility and acceptance. Already, regions like Thrace and Urla have demonstrated that even in a challenging regulatory context, wine tourism can flourish and create a bridge between wine producers and consumers. The key difference remains one of scale and official support: in Italy, wine tourism is broadly supported by local governments and tourism boards; in Turkey, it is still driven mostly by private initiatives. Greater recognition by Turkish authorities of wine tourism's value (for example, in national tourism promotion materials or rural development programs) could accelerate this integration, following Italy's lead.

3.5.5 Innovation, Sustainability, and Climate Adaptation

Innovation and sustainability have become critical themes in the global wine industry, and Italy and Turkey display different levels of progress on these fronts. Italy's wine sector has been proactive in embracing innovation and sustainable practices, spurred by both market forces and regulatory incentives. Many Italian wineries, especially over the past two decades, have modernized their viticulture and winemaking techniques, often blending centuries-old know-how with cutting-edge technology (Scienza & Boselli, 2019; Corsi, Marinelli, & Sottini, 2011). For example, precision viticulture tools—such as drone monitoring of vineyards, soil mapping, and digital disease forecasting—are increasingly adopted by advanced Italian estates to improve grape quality and resource efficiency (Capitello et al., 2020; D'Amico et al., 2016). In terms of winemaking, Italian producers have been early adopters of temperature-controlled fermentation, innovative aging vessels (like experimenting with amphorae or various oak alternatives), and quality control systems, which collectively improved consistency and quality of output. These innovations helped Italy shake off its mid-20th-century reputation for quantity-over-quality and solidify its standing for excellent wines across price ranges (Anderson & Pinilla, 2018).

Sustainability is an area where Italy has made notable strides. Responding to both consumer demand for "greener" products and the realities of climate change, Italian viticulture has seen a significant move towards organic and biodynamic farming. Italy now has one of the largest organic vineyard areas in the world; a considerable share of vineyards are certified organic or in conversion, reflecting a nationwide trend towards reducing chemical inputs (Willer & Lernoud, 2019). Additionally, industry and government initiatives like the VIVA Sustainable Wine program (launched by Italy's Ministry of Environment) have provided wineries with a framework to measure and reduce their environmental footprint (assessing indicators like carbon footprint, water usage, and biodiversity impact). Many Italian wine consortia have also developed sustainability protocols (for example, the "SOStain" program in Sicily or similar programs in Tuscany) to collectively improve environmental performance. This focus on sustainability is not only environmentally driven but is becoming part of the Italian wine brand – consumers increasingly associate Italian wines with artisanal and eco-conscious production.

Climate change poses challenges to both Italy and Turkey, as both countries have warm Mediterranean climates that are becoming more extreme. Italian winemakers are actively adapting to climate change through a variety of strategies. These include shifting cultivation to higher altitudes or more northerly sites (new vineyards in higher elevations of the Apennines or the Alps foothills are becoming more common for cooler conditions), experimenting with heat-tolerant grape varieties (including rediscovering old indigenous varieties that can withstand heat/drought, or planting later-ripening varieties), and adjusting vineyard management (e.g., changing canopy training systems to protect grapes from sun, investing in irrigation where legal and necessary, and harvesting earlier to preserve acidity in grapes as summers get hotter) (Corsi & Pomarici, 2021). Research institutions in Italy, often in collaboration with the wine industry, have been studying climate models and grape responses, providing forward-looking guidance. For example, studies in Tuscany's Chianti region have modelled future climate scenarios and suggested adaptation options for growers (Ferrise et al., 2016). The Italian industry's relative wealth and organization allow it to be resilient and responsive – many producers have enough resources to invest in mitigation (some even implementing renewable energy at wineries, water recycling, etc.) and the government has acknowledged wine in climate adaptation plans.

Turkey's wine industry, being smaller and with fewer resources, has been slower to innovate and remains quite vulnerable to sustainability challenges, though there are encouraging signs of progress in certain areas. One area of strength is Turkey's rich grape biodiversity: ongoing projects to identify and conserve local grape varieties (Sabir et al.,

2017) are a form of innovation harnessing Turkey's unique genetic resources. Preserving and studying indigenous grapes could prove advantageous under climate change, as these varieties are well-adapted to local terroirs (some Turkish varieties are naturally heat and drought resistant, having been cultivated in Anatolia's tough conditions for centuries). There is a growing academic interest in oenology and viticulture within Turkey – universities and researchers have begun publishing more on topics like climate impacts on Turkish vineyards and economic sustainability of winegrowing (Akdemir & Candar, 2022). However, translating research into practice is challenging without strong industry-wide programs.

In practice, many Turkish wineries still employ fairly traditional methods and have only modest capital for technological upgrades. Sustainable practices are not yet mainstream in Turkish vineyards; chemical pesticide and fertilizer use, for instance, is still common, and organic certification is rare (though a handful of boutique producers have gone organic or natural in philosophy). Water management is emerging as a critical issue: Turkey's vineyards, particularly in Anatolia, often rely on rainfall with minimal irrigation (a traditional approach that many believed led to better quality), but with rainfall becoming erratic, this leaves vineyards extremely exposed to drought (O'Brien, 2021). The severe droughts of recent years have already forced some producers to buy grapes from other regions or consider installing irrigation, which many smaller growers cannot easily afford. Without substantial support, Turkey's adaptation to climate change remains reactive – for example, producers simply endure a bad harvest in a drought year, or make ad hoc adjustments, rather than having systemic mitigation strategies. Furthermore, the Turkish government's engagement in supporting wine sector adaptation is minimal, likely due to the political sensitivities around openly aiding an alcohol-related industry. This contrasts with Italy, where government and regional bodies include viticulture in climate adaptation and rural development initiatives.

On a positive note, Turkey's boutique wineries have shown entrepreneurial innovation in the face of adversity: from marketing through wine tourism (as discussed) to experimenting with winemaking styles (some are trying out natural wine techniques, orange wines, or novel blends to stand out). These innovations, while not industry-wide, indicate a creative drive among Turkey's new generation of winemakers. Additionally, some Turkish producers collaborate with international consultants and winemakers (including Italian and French experts) to improve viticulture techniques, demonstrating knowledge transfer and innovation at the enterprise level (Ozay et al., 2005).

In summary, Italy's wine industry stands as a model of integrating innovation and sustainability into its growth, actively future proofing itself through research and adaptation, while Turkey's industry is at an earlier stage, gradually recognizing these imperatives but constrained by resources and systemic support. Climate change looms as a common threat; Italy's proactive measures versus Turkey's vulnerability underscore the importance of strategic planning. Turkey could draw lessons from Italy by investing in sustainability programs (perhaps starting with water management and heat-resilient viticulture), encouraging organic practices, and fostering collaborations that bring in international expertise and technology. The comparative gap here also highlights that long-term competitiveness will depend on how well each country can innovate and adapt: Italy is moving firmly in that direction, and Turkey will need to follow suit to ensure its nascent wine sector remains viable in the face of environmental and market changes.

3.5.6 Strategic Lessons for Turkey's Wine Industry

Drawing on the comparative insights from Italy's experience, several strategic lessons emerge for the future development of Turkey's wine industry. First, it is evident that Turkey would benefit from implementing a more supportive regulatory framework. Establishing a comprehensive appellation system, similar to Italy's DOC/PDO model, could help protect and promote Turkey's unique wine regions and grape varieties (Tosun & Yılmaz, 2023). Alongside this, there is a clear need to reconsider the structure of alcohol taxation and to allow some degree of responsible wine marketing, which would ease current burdens on producers and help them connect with consumers (Özdemir & Schmidbauer, 2023; O'Brien, 2021). The Italian case demonstrates that moderate taxation and clear quality regulations foster industry growth, while excessive taxes and advertising bans, as currently seen in Turkey, have a stifling effect. Striking an appropriate balance between regulation and industry support is therefore essential.

Another key lesson is the importance of fostering a domestic wine culture and encouraging broader consumer demand. Italy's integration of wine into daily life shows that normalizing wine as part of food culture can gradually build a larger home market. Turkey can pursue similar progress by investing in educational campaigns, sommelier training, and culinary tourism that pairs local wines with Turkish cuisine (Evered & Evered, 2016). The aim is to gradually increase public appreciation of wine, especially among urban middle-class and younger people, rather than expecting immediate shifts in consumption habits.

Building a strong national and regional brand identity is also critical. Turkey should capitalize on its winemaking heritage and indigenous grape varieties to create a distinctive image for its wines. As seen in Italy, effective regional branding and storytelling—emphasizing Turkey's ancient wine history and diverse terroirs—can help Turkish wines stand out in international markets. Efforts such as participating in international wine competitions and unifying promotional activities, for example under a revitalized Wines of Turkey initiative, are likely to build recognition and trust (Forbes, 2018).

The Italian model also highlights the potential of wine tourism and cultural integration as drivers of industry growth. Turkey's established tourism infrastructure provides an opportunity to develop wine routes, improve visitor facilities at wineries, and encourage the inclusion of wine-related experiences in travel itineraries. Incentives for wineries that invest in tourism, as well as the integration of wine themes into festivals and gourmet events, can both promote local wine and foster a culture that celebrates wine domestically (Güzel et al., 2021).

Investment in innovation, research, and sustainability is another area where Turkey can draw from Italy's example. Increasing the focus on viticultural research, supporting sustainable practices such as organic farming and water-efficient irrigation, and establishing partnerships with universities or international institutions will improve the industry's long-term competitiveness (Akdemir & Candar, 2022). These efforts not only address environmental concerns but also help position Turkish wine as a forward-looking and quality-driven product.

Finally, industry collaboration and advocacy are crucial. The Italian wine sector's use of consortia and associations for collective marketing, lobbying, and knowledge-sharing shows the advantages of a united approach (Federdoc, 2019). Turkish producers would benefit from a stronger, more organized association to advocate for favourable policies and promote Turkish wines collectively. Greater cooperation can lead to joint promotional events, shared quality standards, and more effective engagement with government bodies, ultimately increasing the visibility and competitiveness of Turkish wines both at home and abroad.

The comparative benchmarking between Turkey and Italy's wine industries illuminates both the significant gaps and the latent opportunities for Turkey's sector. Italy's wine industry, with its robust institutions, entrenched culture of consumption, strong global brand, vibrant tourism linkages, and innovative resilience, represents a mature model that Turkey can study as a guiding reference. Turkey's SWOT analysis – its strengths, weaknesses, opportunities, and threats – is given fuller context by this Italy comparison. Many of Turkey's current weaknesses—such as underdeveloped appellation laws, limited domestic demand, low international visibility, and vulnerability to regulatory constraints—are not considered unique or insurmountable. Similar challenges have been addressed in countries like Italy through strategic policy measures and proactive industry efforts. Likewise, Turkey's strengths and opportunities (such as its rich grape heritage, improving quality, and tourism potential) could be much better capitalized upon by applying lessons from Italy's experience.

In reinforcing the strategic analysis of Turkey's wine sector, this benchmarking underscores a core insight: with the right support and strategies, a nascent industry can transform into a competitive one over time. Italy's journey from a bulk wine producer a few decades ago to a high-quality world leader today involved deliberate improvements in regulation, quality focus, and marketing – steps that Turkey's industry is only beginning to take. The comparison also highlights that external factors like culture and politics profoundly shape industry trajectories. While Turkey's predominantly Muslim context and recent policy environment differ from Italy's, the fundamental drivers of wine sector success – supportive policies, strong branding, consumer engagement, and innovation – remain universally relevant. Adapting these drivers to Turkey's context will be key.

In conclusion, Italy's wine industry offers both inspiration and concrete lessons for Turkey. By learning from Italy's successes and missteps, Turkey can chart a more informed strategic path forward. The benchmarking analysis supports the notion that Turkey's wine sector, though currently modest, has the potential for meaningful growth if it can leverage its unique assets and implement strategic reforms. Such evidence-based comparisons strengthen the strategic planning process, ensuring that recommendations for Turkey's wine industry are grounded in proven practices and realistic assessments. Ultimately, aligning Turkey's development trajectory with the wisdom gleaned from Italy's mature wine economy will bolster the effectiveness of any strategic initiatives and help translate Turkey's millennia-old wine heritage into a thriving modern industry.

4. Conclusion and Recommendations

This thesis has provided a systematic review of the development, current situation, and possible future of Turkey's wine industry. The review found that Turkey has an important place in world viticulture because of its very old traditions, wide range of grape varieties, and suitable growing conditions. Despite these strong points, the wine industry in Turkey remains small and faces significant barriers. The most pressing challenges include strict alcohol regulations, fragmented production, and social sensitivities about alcohol and high taxation (Evered & Evered, 2016; Koç & Koç, 2020). These factors make it difficult for producers to reach a wider market or achieve economies of scale.

Still, the literature points to real opportunities for improvement. There is increasing recognition of Turkish wines in international competitions. More visitors are interested in wine tourism in regions like Thrace and Cappadocia, which helps wineries build direct connections with consumers. A younger and urban generation in Turkey is also showing more interest in wine, leading to a gradual cultural shift (Ribeiro et al., 2020; Seyedimany & Köksal, 2022). In addition, by comparing Turkey with Italy—a country with a successful and well-organized wine sector—this thesis shows that change is possible. If Turkey adapts some of the strategies that have worked well in Italy, such as building strong local brands and increasing cooperation between producers, the Turkish wine industry can improve its competitiveness (Anderson & Pinilla, 2018; Corsi & Pomarici, 2021).

For Turkish policymakers, it is important to see wine not only as an alcoholic drink but as part of the country's cultural heritage and a potential economic asset. High taxes and strict marketing bans have made it hard for wineries to grow or reach more consumers. Learning from European examples, Turkey could review its policies, for instance, by lowering certain taxes for small producers or allowing limited wine advertising linked to tourism events (OIV, 2023).

In practice, there are already some promising local efforts. In Cappadocia, for example, wine tourism has become a key part of the region's attraction, with wineries offering tastings, vineyard tours, and events that connect wine with local history and food. Similar projects could be started in other regions, such as the Aegean or Thrace, to draw both domestic and international visitors.

The industry would benefit from stronger cooperation among producers. Setting up local producer associations or cooperatives can help small wineries share resources, improve quality, and market their wines together. Italy's use of regional wine consortia, like those in Tuscany or Piedmont, shows how such groups can help set standards, promote their region, and negotiate with buyers more effectively. In Turkey, groups like the Thrace Vineyard Route Association are early examples, but more could be done to encourage such collaboration (Tosun & Yılmaz, 2023).

Education and training are also crucial. Universities and vocational schools could offer more programs in viticulture, winemaking, and wine business management. Partnerships with established wine schools or research institutes in Europe could help bring new knowledge to Turkey. Industry workshops on sustainable farming, climate adaptation, and marketing could help producers keep up with global changes (Sabir et al., 2017; D'Amico et al., 2016).

Researchers should continue to study Turkish wine consumers in more depth, especially the habits of younger generations as well as those of tourists. More work is also needed on the effects of climate change on vineyards. For example, some wineries in Mediterranean climates are experimenting with drought-resistant grape varieties and new irrigation methods. Turkish producers could benefit from such innovations by running pilot projects in vulnerable regions.

Finally, international comparisons should be used not just for inspiration but for practical policy-making. Looking at countries with similar social or religious sensitivities, such as

Lebanon or Georgia, could give Turkey new ideas on how to build a modern wine industry while respecting local traditions (Anderson & Pinilla, 2018).

To support growth, Turkey should first review its taxation and regulatory policies, aiming to reduce barriers for responsible wine producers. Creating a balanced policy environment would encourage investment, allow wineries to market their products more effectively, and help the sector reach more consumers (OIV, 2023; Corsi & Pomarici, 2021).

Producers should focus on building stronger regional networks. Through local associations, joint marketing, and quality certification programs, small wineries can work together to improve standards and create a stronger reputation for Turkish wine as a whole (Tosun & Yılmaz, 2023). An example of this is the "Wines of Turkey" initiative, which has helped promote Turkish wines at international fairs, but more such efforts could be developed and better supported.

Expanding wine tourism is a major opportunity. Wineries can create new experiences for visitors by combining tastings, vineyard tours, and local food. Wine routes, like those in Thrace and Cappadocia, could be further developed with the support of local governments and tourism agencies (Ribeiro et al., 2020; Chaudhry, 2024). These projects not only bring direct sales but also help change the perception of wine in Turkish society.

Investment in education, research, and adaptation to climate change is also important. Universities, research centers, and industry groups can work together to improve knowledge and technology transfer. Pilot projects with drought-resistant grapes or modern irrigation methods, for example, could help vineyards deal with changing weather patterns (Sabir et al., 2017; D'Amico et al., 2016).

Finally, the wine industry should continue to reach out to the hospitality sector. Organizing wine festivals, partnering with restaurants and hotels, and running simple educational campaigns can help create a new generation of wine consumers in Turkey (Seyedimany & Köksal, 2022; Özdemir & Schmidbauer, 2023). Keeping an open mind and learning from international examples will help Turkey’s wine industry grow in a way that fits its own culture and strengths.

Ultimately, Turkey's wine industry is a story of untapped potential, rich with unique resources and a venerable heritage. Overcoming existing challenges demands a concerted effort: strategic policy shifts, enhanced collaboration across the sector, dedicated investment in viticultural knowledge, and an agile focus on emerging consumer trends and global markets. Embracing these changes will allow Turkish wines to not only thrive but also to reclaim their rightful place on the world stage.

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