Every Great Wine Starts in Grapevine Nursery.

Tendencies and Perspectives of Sicilian Grapevine Nurseries

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Grapevine nursery production, strictly-regulated by EU norms, represents the important first step in the wine production process, because it’s able to strongly influence both the quali-quantitative performance of farm investments and the type and the quality of wines, with consequences on profitability.

The latest reform of the Common Market Organisation (CMO) for wine took effect on August the 1st 2008 and introduced, among many initiatives oriented towards enhancing the competitiveness of the wine sector, a new voluntary three-year grubbing-up scheme from the 2008/2009 season, achieving a balanced wine market, reducing surplus production and providing an alternative for uncompetitive producers. This new policy is therefore mainly directed to increase product quality, as demanded from both domestic and foreign markets, without neglecting aspects relating to environmental safeguard in wine regions.

Even grapevine nursery sector had been involved in guidelines set out in the new CMO for wine. This new regulatory framework, aiming to strengthen the entire chain, requires propagating material both with genetic-sanitary certification and consistent with recent market trends; in this meaning, it’s important to take account of either market signs concerning the varietal choices and the need to renew vineyards which have come to the end of their natural and economic life.

Graft nursery activity, in fact, is closely correlated with wine market trend, both in terms of quantity and mainly quality, in relation to the meaning and the contents that the consumer assigns to the beverage "wine" (commodity, brand or private label, image or terroir, a mix of the three). However, it is common knowledge that market trends are unpredictable, just as consumer tastes can change abruptly; consequently, the market demand for propagating material is characterized by randomness too.

Therefore, on planning the grapevine nursery production a key role is played on the one hand by nurserymen -on behalf of their knowledge of market trends, their experience, and their instinct too-, and on the other hand by the very specific combination of variety, clone and rootstock chosen by entrepreneurs depending on what will fit the profile of the their wine and what may fit their business requirement in the best way.

The recently increased prestige of Sicilian viticulture and wines, the remarkable technical and managerial skills of entrepreneurs and the favourable climatic and soil environment, exert a positive influence on Sicilian graft nursery activity that takes on the meaning of an important economic activity. According to the latest available data (V General Census of Agriculture, 2000), this activity represents 12.1% of the national investment, mainly oriented towards vine cutting production, and 14.2% of the Italian grapevine nurseries.

Based on these considerations and considering the lack of studies on the sector, this paper aims to realize an updated survey on the Sicilian grapevine nursery in a strategic perspective; first, a structural analysis of the sector will be carried out (number of nurseries, scion and rootstock increase block surface, main cultivars, etc. ..) and, subsequently, a direct survey of the most representative Sicilian nurseries will complete the study. The results will allow to understand specifically the complex mechanisms determining the graft nursery supply from which to infer how nurserymen and winemakers are reacting to the crisis that recently hit the wine market. The latter survey will also allow to verify the Sicilian nurserymen aptitude to integrate innovations into their farm business organization to diversify supply and to increase market shares already held. In that sense, the presence of grapevine nurseries cultivating organic material, on the one hand, would help to characterize the Sicilian wine production on the international markets and, on the other hand, would give a multifunctional value to graft nursery activity.