Every great wine starts in a grapevine nursery. Tendencies and perspectives of Sicilian grapevine nurseries

Valeria Borsellino, Antonino Galati, Emanuele Schimmenti
Structure of research

The study was carried out through:

- a brief description of the regulatory aspects;
- a structural analysis of the sector, both national and regional, based on official data provided by trade associations and public institutions;
- a direct survey of the larger Sicilian nurseries.

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- Rootstock Increase Block
- Scion Increase Block

- Own-rooted vines
- Rootstock cuttings
- One-bud scions
- Grafted vines
- Rooted cuttings
- A graft
Community and Italian norms

Production and marketing of vine vegetative propagation material are subject to a strict legal framework to ensure the health-genetic quality of vine propagating material.

Such legislation, which derives from Council Directive 68/193/EEC, is based today on the:


Italian Ministerial Decree of 8 February 2005
Legislative Decree of 19 August 2005, n. 214
Italian Ministerial Decree of 7 July 2006
Italian Ministerial Decree of 8 February 2005

Vine propagating material cannot be placed on the market unless it has been officially certified as:

- initial propagating material
- basic propagating material
- certified propagating material
- standard material

Initial and Basic propagating materials can be used only by nurserymen for the realization of mother plants blocks (Scion and Rootstock Increase Blocks) from which harvest scions and rootstock cuttings to obtain Basic and Certified materials, respectively.

Vine-growers may only plant in their vineyard Certified or Standard propagating materials resulting from nursery.
Italian grapevine nursery

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Scion Increase Block surface in Italy

![Scion Increase Block surface in Italy graph]

- Surface (hectares)
- Basic material
- Certified material
- Standard material
- Total
- * 2006 data not available.
- Source: Our elaboration on MIVA data.

Rootstock Increase Block surface in Italy

![Rootstock Increase Block surface in Italy graph]

- Surface (hectares)
- Basic material
- Certified material
- Standard material
- Total
- * 2006 data not available.
- Source: Our elaboration on MIVA data.

Evolution of grafted vines production in Italy, 1999-2008 and 2009-2015 forecasts

![Evolution of grafted vines production graph]

- Million of grafted vines
- Unsold
- Export
- Italy
- Source: Our elaboration on MIVA data.

Evolution of rooted cuttings production in Italy, 1999-2008 and 2009-2015 forecasts

![Evolution of rooted cuttings production graph]

- Million of rooted cuttings
- Source: Our elaboration on MIVA data.
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Sicilian grapevine nursery (1/2)

**Evolution of Scion and Rootstock Increase Block surfaces in Sicily, 2005/06 - 2009/10 campaigns**

**Distribution of Scion and Rootstock Increase Block surfaces in Sicily by province, 2009-2010 campaign**

Source: Our elaboration on data from Assessorato Regionale delle Risorse Agricole e Alimentari (Dipartimento Interventi Strutturali per l’Agricoltura - Servizio Fitosanitario Regionale - U.O. Vivaismo).
The overall number of Sicilian nurseries in the 2009/2010 campaign was of 115 units, mainly located in the provinces of Trapani, Ragusa and Messina.

A strong reduction of Sicilian grapevine nurseries has been recorded over the last 5 agrarian campaigns (-35.1%).
Methodological approach and survey design

8 nurseries covering

- nearly the overall production of grafted vines
- 30.0% of the regional rooted cuttings production
- 30.0% of the rootstock increase block surface
- 20.0% of the scion increase block surface

The survey was conducted by administering a questionnaire structured in the following sections:

- general aspects of the company;
- production and commercial aspects;
- qualifying aspects of production and business activity;
- specific questions concerning both the new guidelines from market and sectorial policies.

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# Structural and productive aspects

The production of vine propagating material is the **core business** of all surveyed nurseries. The nurseries are all family-owned companies, supported by wage labour, and today conducted by young entrepreneurs who inherited such activity from family tradition.

## Utilised Agricultural Area (UAA)

<table>
<thead>
<tr>
<th></th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Total Utilised Area</td>
<td>131.65 ha</td>
</tr>
<tr>
<td>(range)</td>
<td>(5.30 to 36.10 ha)</td>
</tr>
</tbody>
</table>

## Production

### Rootstock increase block

- 32.90 hectares
  - (1.40 to 12.00)

### Scion increase block

- 25.93 hectares
  - (0.63 to 16.20)

### Nursery fields

- 45.13 hectares
  - (1.00 to 11.50)

### Other

- 27.65 hectares

### Varieties:

- Catarratto, Grillo, Inzolia, Nero d'Avola, Syrah, Nerello Mascalese

### Rootstocks:

- 1103 P, 140 R, 779 P, 775 P

### Production

- 5 million of rooted vines

### Standard grafted vines

- 3,435,700
  - (60,000 to 1,020,000)

### Certified grafted vines

- 418,000
  - (4,000 to 200,000)

### Grafted vines in pots

- 20,200
  - (2,200 to 18,000)

### Rooted cuttings

- 1,172,900
  - (35,000 to 650,000)
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**Commercial aspects**

- **Nurserymen and wholesalers**
  - Sicily 89%
  - Rest of Italy 10%
  - Foreign countries 1%

- **Vine-growers**

- **Sold production:** 4.3 million rooted vines

<table>
<thead>
<tr>
<th>Grafted vines</th>
<th>Rooted cuttings</th>
<th>Vines potted</th>
</tr>
</thead>
<tbody>
<tr>
<td>€0.80 per piece</td>
<td>€0.40 per piece</td>
<td>€1.90 per piece</td>
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<table>
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<tr>
<th>Turnover classes</th>
<th>N.</th>
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<tbody>
<tr>
<td>&gt; € 500,000</td>
<td>3</td>
</tr>
<tr>
<td>€ 301,000 to € 500,000</td>
<td>1</td>
</tr>
<tr>
<td>€ 151,000 to € 300,000</td>
<td>1</td>
</tr>
<tr>
<td>€ 81,000 to € 150,000</td>
<td>2</td>
</tr>
<tr>
<td>€ 40,000 to € 80,000</td>
<td>1</td>
</tr>
</tbody>
</table>

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Product and process innovations (1/2)

The health-genetic and technological quality of nursery production and of productive process is a priority for the surveyed nurseries.

6 nurseries merchandise their production with a brand name, reported in the cardboard boxes where the rooted vines are packaged to be marketed, to improve the company image on the market.

The planning of the nursery production is made on: the customers’ suggestions, the entrepreneurs’ intuition, and the market dynamics of the previous year.

The R&D activities are implemented for the phytosanitary defence, forcing and transplanting, with the collaboration of public corporations and especially Universities.
Product and process innovations (2/2)

Over the past five years all the surveyed nurseries have introduced technological innovations to:
- reduce water consumption;
- optimize rooting and lignification of rooted vines;
- improve phytosanitary defence and pest control.

There is a low propensity of nurserymen to diversify farm production.

Currently the main supply differentiations are:
- grafted cuttings in plastic pots;
- ornamental plants.

In the next future, organic rooted vines and table grapes propagation material will be produced.
Final remarks (1/2)

The sector of grapevine nursery production has recorded in recent years profound changes: in the past the biggest choice was between red and white grapevines, today the interest in new varieties, clones and rootstocks has increased and resulted in the creation of a huge variety of propagation materials in which wine makers may select specific combinations of variety, clone and rootstock.

The Sicilian performances emerged from this survey, reflecting the national trend, showed a sharp drop in rooted cuttings production, not balanced by the rise of grafted vines supply.

Over the last 5 years the need for the big investments essential to grafted vines production has been one of the reasons for the contraction in the number of Sicilian nurseries.

The survey shows that nurseries are more inclined to produce standard grafted vines rather than the certified ones, to satisfy new consumption habits oriented towards native varieties.
Final remarks (2/2)

From the survey it emerges that product is almost exclusively marketed within the regional boundaries. The prevalent regional use of production, and the increasing competition of the propagation material from Northern Italy and from abroad, affect the average price level.

The new Common Organization of the Market in wine (especially the premium for permanent abandonment) will lead to a productive scenario characterized by the decline of viticulture, especially in the Southern regions, with a remarkable impact for grapevine nursery.

The Sicilian grapevine nursery seems to have partially recovered the technological gap of the past by adopting, as it emerges from this survey, innovative investments, mainly in the fields both of quality and of technological innovations.

The opportunities for growth and development of the Sicilian grapevine nursery sector are subject to the companies’ ability in implementing a policy of product upgrading and supply differentiation able to satisfy the vine-growers demand.
Thank you very much for your kind attention

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