

# Trends

## Top-grafting / Field-grafting



## Bordeaux takes on field-grafting

**In order to face the viticultural crisis, Bordeaux has adopted field-grafting. Top winegrowers are working on the rebirth of this mystical wine growing area.**

According to the Interprofessional Committee for Bordeaux Wines (CIVB), the region's wine producers have asked for government aid to pull out an area of 9,251 hectares, more than 8% of the total cultivated area (110,000 hectares).

This current wine crisis is the most important challenge the region has faced since 2004 and 2005, when

local wine producers and merchants were fighting against overproduction and opposition of the CIVB.

Since 2020, the market has been heavily impacted by the Covid-19 pandemic, and is still affected by the huge slowdown in trading volumes. Critical Chinese markets were shut down.

Wine stocks rose significantly and still haven't depleted. The health crisis caused a huge drop in exports, heavily due to the imposition of the "Trump Tax" in 2019 and 2021, which deprived the US market of French wines.



Top-grafting program carried out in a Bordeaux vineyard by the Worldwide Vineyards' grafters

### Field-grafting has a future

**In only one year, winegrowers can replace the varietal of a specific block, without pulling out and replanting the vines**

↪ **The Root system is preserved**

↪ **Trellising remains intact**

↪ **Loss of only a single crop in a year**

### Good to Know

**The following year, winegrowers can immediately produce a bottle full of character thanks to the root system that has been preserved and a more adaptable varietal**





Even if the US Supreme court, under the democratic influence of Joe Biden, temporarily blocked the Trump tax for 5 years, market losses remain substantial and market shares will be difficult to win back.

The current inflation crisis affecting all European economies since the beginning of the Russo-Ukrainian conflict in February 2022 has further worsened an already precarious situation. Additionally, there is a structural decline in wine consumption, which has decreased by 70% in France over the past 60 years. Finally, the media campaign known as "Bordeaux bashing," which began a few years ago with reports and articles denouncing the ecological backwardness of this famous wine region, has been, since then, extensively echoed and exacerbated on social media. Today, it appears that growers approximately 15,000 hectares are potentially eligible to receive financial aid to pull out their vineyards, but only 9,251 hectares qualify. This represents a total of 1,085 wine producers, who will receive around €6,000 in compensation for every uprooted hectare. This will represent a total subsidy of nearly 57 million euros being co-financed by the French government (38 million) and the Interprofessional Committee (17 million). The strongest argument currently being put forward by the region's winegrowers is to advocate for the fight against a specific grapevine disease, *flavescence dorée* (*Candidatus Phytoplasma Vitis*). Indeed, the abandoned vineyard parcels, that would thus remain untreated, would inevitably become sources of contamination, and spread the phytoplasma disease, transmitted by vine leafhoppers (*Scaphoideus titanus*).

Eligible winegrowers will remove their plots either permanently or in favor of other cultivations, such as olive trees or hazelnut trees, which are gaining popularity. To be thorough about government subsidies, it should be noted that on November 8th, 2023, the French National Assembly approved an emergency aid plan of 20 million euros for winegrowers in the Southwest region of France who were severely impacted (>30%) by downy mildew in 2023.

Beyond political measures, some winegrowers rely solely on themselves to face the challenging circumstances and are revitalizing a technique for vineyard restructuring that is quick, efficient, and cost-effective: the field-grafting (top-grafting) of grapevines.

This small-scale vegetal «surgery» consists of changing the grape variety of an existing vineyard, regardless of its age, in just one year, sacrificing only one harvest year. In comparison, uprooting and replanting a vineyard requires a minimum of 4 to 5 years before producing a wine that remains «youthful» for several vintages. Additionally, this fails to take into account a soil's resting time, typically, the minimum being 1 to 8 years, with 10 to 20+ years being strongly recommended.

## Field-grafting

is an efficient, quick and  
cost-effective solution to  
varietal conversion







Since 1983, as the precursor and discloser of this field-grafting method (see Professor Boubals' 1985 article, in the *Progrès Agricole et Viticole*, "It is absolutely necessary to learn how to top-graft grapevines"), Worldwide Vineyards is the leading and most experienced operator of this technique in Europe, and perhaps the world. Despite numerous publications, conferences, and training sessions with Agricultural Chambers, this means of restructuring vineyards still remains overlooked by educational institutions, manuals, and professional organizations. Word of mouth is the only effective form of influence, especially in the Bordeaux region, when emergencies arise.

In between 2010 and 2020, Worldwide Vineyards carried out approximately 30,000 – 35,000 grafts a year in the Bordeaux region. The primary concern at the time was to replace previous varieties with a more reliable grape. Merlot and Cabernet Sauvignon were mainly chosen to replace blocks of Petit Verdot, Malbec, or Carmenere.



It was also oftentimes necessary to interchange the plots of Merlot and Cabernet Sauvignon depending on the prematurity of the terroirs. Finally, the trend of the last decade was to introduce more qualitative massal selections, in place of clonal selections that were often too uniform or too productive. This last trend still remains relevant and is continually growing among the most reputable winemakers of all regions and countries.

Worldwide Vineyards performed nearly 39,000 grafts in the Bordeaux region in 2021, 97,000 in 2022, and 122,000 in 2023. Thus, in two years, the turnover in this region has more than tripled. It's not that overall grafting frequency has changed, but rather the location of the interventions. At the same time, Italian demand decreased in equivalent proportions. One might think that when some producers prefer to "wait" and suspend restructuring operations, such as replanting or field-grafting, hoping for better days, the Bordeaux wine producers have decided to take matters into their own hands. The other two French vineyards that have been heavily impacted by the current wine crisis, i.e. the Côte-du-Rhône and Languedoc regions, are moving in the same direction of restructuring through grafting, but to a lesser extent. In Provence, demand for grafting grapevines has been consistent, but motivations seem to differ. For several years now, the Provençal winegrowers, both individuals and cooperatives, have decided to quickly regraft their unproductive plots in favor of more generous and lucrative grape varieties (such as Cinsault), to meet the booming demand for rosé wines.

## Adapting to the Market

**In Bordeaux, the demand for field-grafting has tripled in the last 2 years to attend to new challenges**





In comparison, other French wine regions have not changed much regarding the use of field-grafting as a means of restructuring. Grape varieties are generally replaced for marketing purposes or for adapting to climate change. For example, in Alsace, Sylvaner and Gewurztraminer are being replaced by Riesling, as well as Pinot Noir and Syrah. In other wine regions, the recent trend is to plant rootstocks that are later field-grafted, oftentimes with massal selections. This helps establish healthy and sustainable vines (unaffected by wood diseases) in order to produce superior and more valued wines. In Bordeaux, winegrowers have already been following this trend for years, in addition to their top-grafting restructuring operations. Many renowned châteaux are reconnecting with these ancestral techniques for the same reasons.

There are various motives associated with field-grafting, beside the expedited process of changing varieties in Bordeaux, but certain trends prevail.

In 2023, for the first time in its 38-year history, Worldwide Vineyards has grafted slightly more white varieties (50.07%) than red ones in Bordeaux, whereas red varieties have historically dominated at 80-90%. As a matter of fact, the Bordeaux grapevine assortment is composed of 90% red varieties: 40% Merlot, 20% Cabernet Sauvignon, and 20% Cabernet Franc. The remainder consists of secondary grape varieties.

This year, Sauvignon blanc has multiplied significantly through top-grafting (25% of the company's operations), surpassing Chardonnay (15%) and Semillon (10%), even though Semillon is structurally the most planted varietal (50% of the total white surface). Other white varieties are not as popular, especially Muscadelle, often overlooked in these restructuring operations, despite being emblematic of the Bordeaux region. Perhaps it's due to its late maturation, its susceptibility to fungal diseases (powdery mildew and gray rot), and its tendency to produce sweet and heady wines, which are currently less in demand. Dry and aromatic wines are the ones driving the market today: Sauvignon blanc, Chardonnay, and Semillon in Bordeaux, as well as Vermentino, Riesling, Grenache blanc, Chenin blanc, Roussanne, Carignan blanc, etc., in other French regions.

It is important to adapt to the top-grafting market trend. Bordeaux wine producers have chosen to opt into for restructuring purposes, in order to immediately offer wines that meet demand, since it is the fastest and most effective method to not only avoid losing market share but to also gain it. The second position in ranking, achieved by an exogenous grape variety, Chardonnay, is mainly a result of the dynamism of local operators who wish to respond to specific outlets and launch new marketing opportunities for Bordeaux wines.



**As a true powerhouse  
of the wine business,  
Bordeaux anticipates  
and spearheads future  
trends**





Motivations, in contrast, appear to be different when modifying the assortment of red grape varieties. The proportion of grafted red grape varieties has fallen from 90% in 2021 to 50% in 2023. Among the most valued varieties, Cabernet Franc ranks in first position with 21%, followed by Merlot at around 16%, and Cabernet Sauvignon, which has plummeted to less than 2%.

It is noteworthy that, unlike white grape varieties, which are grafted onto red varieties, red grapes are grafted onto the same color. Therefore, motivations are not so much to align with the market, but rather improve the plant material of each vineyard.

In addition to using massal selections to replace clonal plots, there is an undeniable desire among winemakers to enhance the quality of their wines by eliminating the least qualitative plots. This may rectify the overall maturity of some plots, whether too early or too late, as well as reduce the proportion of a certainly traditional, but less qualitative, grapevine assortment. There is also a wish to address climate change by selecting varieties that mature later or are less rich in alcohol.

Finally, we can see two major trends currently popularizing amongst Bordeaux wine producers.

On one hand, there is an inclination to experiment with new varieties that are not native to the region, in order to stay ahead of both the market and climate change. This involves the use of Portuguese, Spanish, Greek, or Provençal varieties, which are more resistant to heat and drought conditions. On the other hand, there is a revival of historical, so-called "forgotten" grape varieties in Bordeaux, such as Castets, Bouchales, or Mancin, which is significant (>4%) but also indicative of the desire to differentiate themselves in a vast marketplace where competition is fierce.

By its ability to quickly provide solutions for restructuring vineyards, Worldwide Vineyards can boast of having the most enterprising wine producer clients in the wine sector, the majority located in Bordeaux. Undoubtedly, due to its reputation and the economic weight of its operators, one can say that Bordeaux stands as a true powerhouse of the wine industry. The viticultural trends that Bordeaux sets in motion will replicate during the following years in other vineyards around the world.

The evolution of the new grapes varieties that have been introduced in the past 3 years, and seem to be confirmed for 2024, may give us an idea of what will happen elsewhere in the coming years.

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