AUSTRALIAN NETWORK for PLANT CONSERVATION INC

ANPC NATIONAL NATIVE SEED INDUSTRY WORKSHOP - NOVEMBER 18 2016

WORKSHOP OUTCOME SUMMARY REPORT

by ANPC Project Manager Martin Driver

INTRODUCTION

The following notes represent a summary of the Australian Network for Plant Conservation (ANPC) National Native Seed Industry Workshop held on the final day of the 2016 ANPC biennial Conference in Melbourne on 18 November 2016 – see www.anpc.asn.au/APCC11/workshop. It was attended by approximately 70 participants and supported by the Rural Industries Research and Development Corporation (RIRDC).

Martin Driver (ANPC) introduced the workshop outline and as a precursor gave an insight into his working life in the native seed industry and the issues and limitations that he has come against.

Paul Gibson-Roy (Greening Australia) gave an overview of the scale of the native seed industry in the United States following his recent Churchill Fellowship study tour. He also outlined some preliminary results of the first stage of the National Seed Industry Survey supported by RIRDC and conducted by Nola Hancock (Macquarie University). Due to the demand expressed at the workshop, the survey was re-opened in February 2017 to allow for much broader representation and consultation. The final survey results will be summarised in an Appendix 2 after its closure on April 28 2017.

Linda Broadhurst (CSIRO) gave a presentation of the issues and implications of research findings in relation to genetics in the native seed and restoration industry in Australia. These presentations set the scene for people to identify and articulate their own issues and concerns with the native seed industry in Australia.

Bill Fuller, Australian Seed Federation (ASF) CEO gave an impromptu presentation on the role of the Australian Seed Federation in uniting the needs of commercial agricultural seed producers. He also offered his impressions of the state and needs of the native seed market and “industry”.

Notes of points arising and questions posed from these presentations are summarised in Appendix 1.

WORKSHOP FACILITATION SUMMARY

The summary notes below are taken from the facilitated workshop undertaken by professional facilitator Jen Liliburn (Kismet Forward). The workshop collated the range of disparate themes raised in presentations and discussion into like subject areas or ISSUES from all participants. Participants were then asked to aggregate into groups that best covered their concerns and agree on OPPORTUNITIES these issues presented and then ACTIONS that progress the issues.

All participants were then asked to allocate stars to the issues they felt of the most importance to the native seed industry to address their key issues or concerns. .

Overwhelmingly the primary ISSUE & OPPORTUNITY revolved around the establishment of a National Native Seed Industry Association or similar and the need for further similar workshops around the country to seek wider representation and further identify and clarify key issues.

Other key ISSUES identified were the need for seed standards/ accreditation/ systems and uniformity at a national level (presumably as a consequence of a national native seed body) and the overall sustainability (economic and environmental) as a consequence of fragmented /insecure markets (supply and demand disconnects) and lack of co-ordination.

The ISSUE of the need for increased and sustained DEMAND (as per the US examples) in the Australian native seed market was a recurring theme. This then can potentially lead to development of an ”industry” organisation, industry standards, training and justification for Seed Production Areas (SPAs) to reduce pressure of potential overharvesting of wild populations and allow some of the genetic issues to be addressed.

As in the US, the primary market in Australia is Government. However, unlike the US, the Australian Government market (at all levels) has been erratic, short term and project based, uncoordinated and in decline since its peak in the 1990s.

CONCLUSION

It is immediately obvious that there are many interconnections and feedback loops with all the issues identified in the workshop and survey. The Australian native seed industry will not be able to address these issues without some level of national co-ordination or representative body. To further confirm the issues and needs of industry participants and the support for such an organisation, it would be essential to replicate this workshop format in key locations of active native seed use. Suggestions have already been made for workshops to be conducted in Perth, Adelaide, Central and Northern NSW/ SE Queensland, but not necessarily restricted to these locations.

To conduct these proposed workshops additional funding would need to be sought from both Government and Industry sources to ensure geographic coverage and sector wide participation.

RAW NOTES FROM FACILITATED WORKSHOP

ISSUE 1: Industry Coordination/ Representation

OPPORTUNITY: Establish an Industry Association – 12 Stars

ACTIONS:

- Seek advice/ endorsement on seed industry representation model
- Budget $150-200K PA for 3-5 years- then self-funding
- Initially Government funding- 1-3 years- RIRDC????, philanthropy (Potter etc), competitive grants, producers, users, champions
- Initiators- (ANPC, GA, ASBP, ASFC –in-kind??), Regional peak bodies
- Host organisation/ steering group

ISSUE 2: Need a national peak body for native seed industry.

OPPORTUNITY: Establish an industry association peak body for the national native seed industry- 5 Stars

ACTIONS:

- List of potential key contacts (individuals, organisations, companies etc)- allocate roles to expand contacts;
- Convene more ANPC workshops to establish endorsement for the proposal & identify further key issues; further develop & expand survey & workshops; identify gaps in issues
- Engage with Government (Federal, State, LG) on process & support
- Establish a communiqué from this workshop that establishes the position of the workshop from the broad church of organisational leaders

ISSUE 3: Need for a national native seed Mission Statement

OPPORTUNITIES: 7 Stars

- Communicate ANPC Workshop participants Mission Statement (DRAFT)
- Circulate Mission Statement to wider networks (ANPC, GA, Stipa etc) for endorsement
- Establishment endorsement of Mission Statement from powerful industry sources (mining, conservation???)

ACTIONS:

- Ask for support for a national peak native seed body today
- By email- develop a draft communication/ promotion/ marketing strategy
- Create Champions for the native seed industry

ISSUE 4: Identify key players in the native seed industry

OPPORTUNITIES/ACTIONS: 1 Star

- Ascertain & contact existing organisations associated with native seed (RIAWA, IFFA, etc)
- Seek EOI for support for formation of national seed industry body
- Establish a working group with demographic representation
- Seek funding support from existing/ related organisations

ISSUE 5: Lack of accreditation in industry & education to support industry accreditation

OPPORTUNITY/ ACTIONS: 6 Stars

- Develop code of practise/ standards- based on Florabank & update;
- Develop training to support code of practice- single set of resources & industry codes; VET accredited units (or whole certification); delivered by industry, assessed by RTO- FLORABANK Banner (CSIRO, ANPC,GA etc)
- Tests to receive collection permits- Fed/ State permits & checking
- Industry "Whitecard" tied to "Florabank" standards- to reduce administrative burden
- Seed buyers training- need education on standards & ordering/ supplying seed to meet industry standards – deliver through industry leaders-ie adopt/ adapt RIAWA developed guidelines

ISSUE 6: Need for development of an industry marketing/ promotions working group

OPPORTUNITIES/ ACTIONS:

- Development of a native seed industry- conduct market analysis/ SWAT to identify stakeholders & demographics
- Develop a marketing team- experts in communication- use social media, cool logo, promote women/ indigenous/ young people & careers in reveg for Australia's future, develop "new" language to speak to values of other industries –eg stop using term g
- "grassland" & instead use grass & herbland or even wildflowers

ISSUE 7: Lack of knowledge sharing (skills, research & practice)

OPPORTUNITY/ ACTIONS:

- Establish on-line seed forum (eg Florabank)- involving seedbanks, collectors, growers, researchers, practitioners etc
- Establish a peak seed body "Florabank" model
- Local workshops to bring researches & practitioners together on issues & share info
- Establish public education component ?

ISSUE 8: Supply & Demand-

OPPORTUNITY: Need for coordination of supply & management of demand - 5 Stars

ACTIONS: 5 Stars

- Initiate a national industry body
- Establish industry standards- linked to industry body
- Reinstate a funded Florabank delivery model- linked to peak industry body
- Initiate/ support regional seedbank networks- emails, meetings, communication 7 contacts
- Government resourcing to regional seedbank networks- as key coordinator in all vegetation programs

- Consultation with seedbanks/ networks in all veg programs
- Database tracking- heritage tracking, location info & coordination, tracking of where all seed has gone- collation of information
- Recognition of seedbanks as the standards, accreditation, coordination & training unit centres in seed supply services

ISSUE 9: Supply & Demand- “Government is the market”

OPPORTUNITY: 5 Stars

- La Trobe Valley Rehab – 2 Stars
- Western Grasslands- 1 Star
- Delegations to Canberra
- Meeting biodiversity/conservation/ offset targets
- Competitive neutrality- 1 Star
- New agricultural income for adding/ improving native vegetation
- Native vegetation as essential national public infrastructure- 1 Star
- SPA development- employment creation

ACTIONS: 6 Stars

- Establish an national industry association to support industry development & development proposals- 5 Stars
- Permit conditions requiring only indigenous native vegetation from accredited industry suppliers – 1 Star

ISSUE 10: Sustainable Harvesting

OPPORTUNITIES:

- Development & support for SPAs – Stipulation, Regulation & Research – 1 Star
- Development of standards, rules & compliance of remnant/ native seed harvesting on public (& private??) land tenures with peak industry backing & endorsement – 3 Stars
- Co-ordination, compliance of seed collection rules, regs & licencing with Gov support at all levels- 1 Star
- Database & heritage seed tracking & target opportunities for SPA establishment – 1 Star
- Sound & Efficient seed storage & use (minimise seed wastage) – research & innovation

ISSUE 11: Applied Research

OPPORTUNITY: Establish a CRC for Applied Restoration Ecology – 11 Stars

- Driven/ lead by seed industry (seed suppliers, mining, Ag, transport, Gov, NRM, Unis/ CSIRO)
- Access & be informed by practitioner knowledge & needs. Involve research in active restoration projects.

ISSUE 12: Lack of research funding

OPPORTUNITY: Establish CRC (as above)- 1 Star - consider reframing traditional sources- ARC, Env. Agencies etc

ACTIONS:

- Advocate – high profile/ appropriate person (no bias)- media / spin
- Legislative actions- lobbying by peak body with key messages
- Corporate- social/ environment investments- insurance/ super companies
- Philanthropy- education, link to social research- what do people want/ need??
- Mining- lobbying & legislation
- Offset mechanisms- levies & legislation- Gov. market
- Celebrating/ highlighting achievements- media etc
- Seizing opportunities- meetings of people/ funding announcements/ elections

ISSUE 13: Provenance research/ changing environments

OPPORTUNITIES: 4 Stars

- Emerging technologies
- Assisted colonisation/ translocation
- Embed research/ experiments into current on-ground restoration- eg multiple provenances marked & recorded; genetic tests/ trials included
- Widen understanding of scope of “provenance” including expanding across state boundaries

ISSUE 14: Disconnect within supply chain

OPPORTUNITIES:

- Create standards for seed supply chain
- Code of practice
- Communication/ coordination

ACTION:

- Establish an industry wide code of practice
- Industry reps to convene to outline issues & gaps (agreed process)

APPENDIX 1

WORKSHOP PRESENTATION/ DISCUSSION NOTES

First session: questions and comments

Is the US example biased to forbs and grasses? What about areas like WA where shrubs are more the revegetation priority? Some things are easier, but there are techniques eg. forestry methods for trees.

There are differences in biology between US communities and ours. We shouldn't over-promise. We will need to find our own way of doing it.

Is the US industry doing native or indigenous species? → there is now a lot of consideration about provenance, less so in the early days. Most growers looking at regional sources, ecotype suited plants, not strict <5km provenance but still local in a sense.

Discussion: What changes have been evident in the native seed industry in the last 20 years?

Zero – in WA.

There was little – perhaps an increase in seed for ground layer plants.

Suggestion there's big change – we all wouldn't have been here. Massive research in Greening Australia in Victoria. Inter-urban local government now have bushland crews, requirements to revegetate on developments.

Through the 1990s and 2000s short-term funding for regional seed banks, now have mainly dropped out and few commercial or industry people filling the gap. (NSW)

There was an assumption they would be self-sustaining by the time the funding ran out.

Without demand no supply, without supply no demand.

20 years ago, 50ha projects would fail because too big. Now 500ha projects fail.

Consultant for subdivisions, roads etc – 20 years ago people didn't care much, just "native" eg. spotted gum, others not easily available. Now it's better eg. acacias, we get monocultures of Atriplex or Rhagodia which are a bit longer lived, demand is short lived and not encouraged because it can't often be met. Trying to use indigenous plants but forget it if it can't be done.

We need our "Ladybird Johnson" figure or legislation! Need to push Gregory Andrews, Threatened Species Commissioner.

Developers won't change unless you make them.

Melbourne Water: 5 year plan for 800km of stream frontage revegetation (both sides=1600km).

One participant just lost contracts with Melbourne Water who have gone with a small handful of large contractors, no innovators, state government appears to be doing this across the board eg. WGR – large generic companies not specialists. Indigenous nursery rep - also says that the tendering process rules them out.

Are we organised to insert ourselves into the process eg. new Sydney airport?

Huge pressure on contractors, mostly small-medium companies, big pressure on industry to go with single suppliers. Also, small projects can deplete seed resource and make large projects harder.

Despite little change in WA seed industry the overall enviromental industry has grown significantly.

We are on the edge of an extinction event in Victoria and it's getting hard to find seed for many species.

Canberra: Telopea and Callistemon plantings on highways. Lots of waterway/wetland restoration in suburban developments. Provides more interaction with community, people.

Questions on industry survey:

We didn't get a sense of the actual size of the industry, from the responses received. Eg. we probably didn't pick up some of the mining sector. There is a need for a wider audit. This was reinforced in feedback from people that had not yet participated in the initial survey.

Will use raw data to (when properly analysed) to produce articles eg for The Conversation.

ANPC and others looking at developing guidelines for seed standards, seed collection and SPAs along the Florabank Guidelines.

Bill Fuller's talk on seed industry

CEO of Australian Seed Federation (ASF)

Membership organisiation – 2 employees – funding from members. Low budget, but completely independent. Most members at the smaller end of the scale.

Members usually competing against each other – Federation works on issues of broader concern, eg integrity in the industry. Try to grow the overall market.

Impressions of native seed industry: Supply & Demand: the main issue. Sporadicity a problem. Fragmented industry.

Is the US industry model an aspiration of those here? **(YES was the overwhelming response).**

Important that the industry builds infrastructure and integrity now, not waiting until industry is large.

Have a code of practice for the industry as a whole, creating national framework to get past state seed acts limiting trade.

Issues prioritisation

Supply & Demand:

- Sustainable demand, long-term sustainable demand, growing demand.
- Government is the customer: policy, demand, incentives.
- Create demand for native seed in agriculture, eg native pasture.
- Advocacy champion, legislation etc.
- Lack of seed sources, wild collection – biological constraints on supply.

Industry coordination & communication:

- Association, guidelines, audits, mission, code of practice.
- Standards and definitions of products.
- Industry structure, national umbrella.
- Bringing buyers and sellers together to set specs.
- Tender/contract guidelines to use small medium large businesses.
- Rogue operators; standards and ethics; methodology to achieve short term landscape approval.
- Recognition of diversity of interests and motivations in industry.

Education:

- Education – community, governmant.
- Building capacity to meet demand.

Research:

- Research – diversity, terminology, training; Define provenance; Setting realistic outcomes/expectations for seed, eg. where field results are quite small. SERA guidelines etc
- Need to find out what works- equipment, methods, timing of seeding, etc ie. agronomics/horticulture. Record and make available research and learning from previous years.

Advocacy & recognition:

- Being innovative and opportunistic.
- Achieving biodiversity via other methods, using marketing etc.
- Sustainable business model. Seed as a legitimate business and industry activity. Wages, working conditions etc.
- Value conflicts eg commercialisation vs conservation.

Ranking issues

Top issues identified for each topic:

Supply & demand.

1. Government as driver – funding and policy.
2. Co-ordination of collectors, sustainability of harvesting.

Industry co-ordination.

1. Establish support for an association/peak body.
2. Identify key players in the native seed industry not already engaged.
3. Identify funding for the association.

Advocacy.

1. Develop statement of intent and distribute to listed groups etc.
2. Vision/mission statement needed.
3. Biodiversity communication – communicating conservation values to different audiences.
4. Developing co-ordination of stakeholders.

Education.

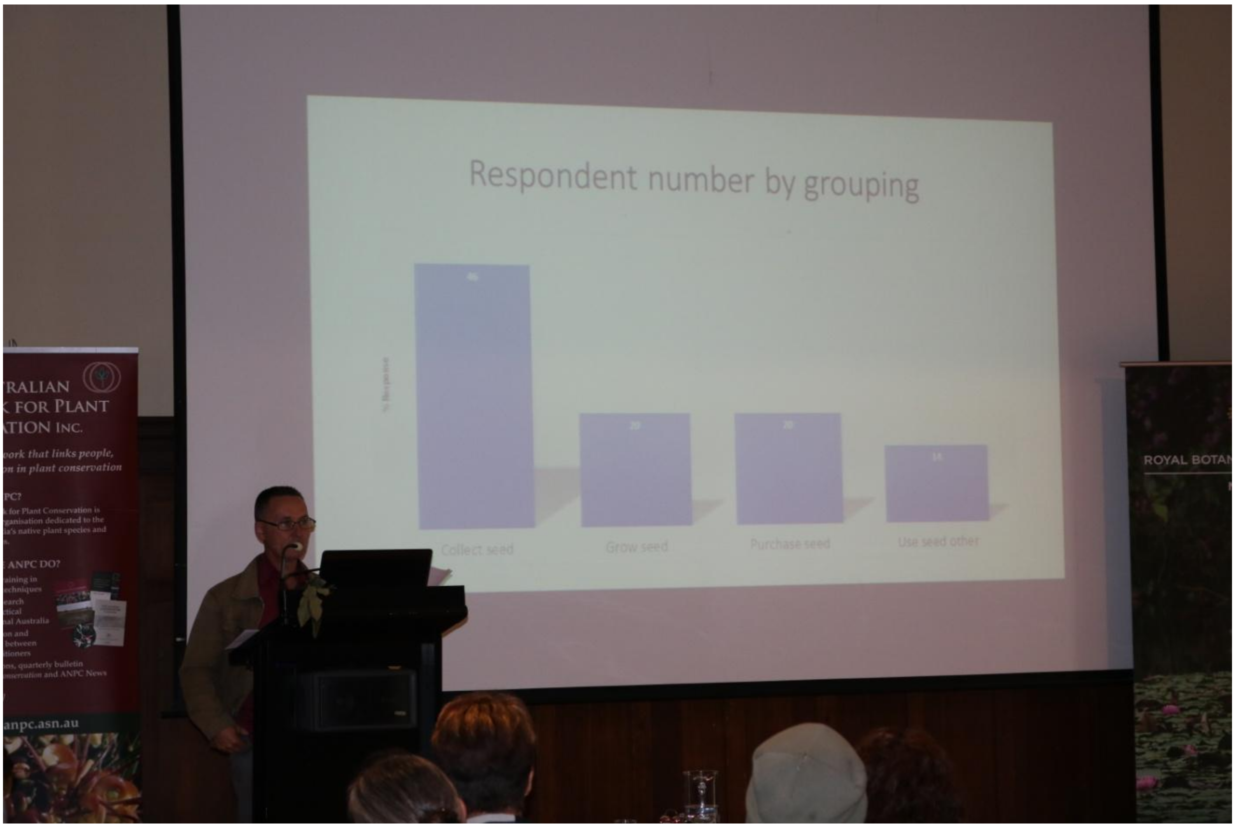
1. Need consistent training resources/standards in the industry.
2. Sharing research with industry.
3. Better information for seed purchasers.

Research.

1. Sustained funding for longer term research.
2. More applied, on-ground research.
3. Thinking about provenance in context of changing climates etc.

Martin Driver presenting at the APCC11 Native Seed Industry Workshop (Photo: Jo Lynch)

Paul Gibson-Roy presenting at the Seed Industry Workshop. (Photo: Jo Lynch)



Paul Gibson-Roy presenting on the Seed Industry Survey. (Photo: Jo Lynch)

Participants brainstorming at the Australian Native Seed Industry Review workshop (Photo: Martin Driver)