PROJECT PHOENIX

HOW MUCH DOES NATIVE SEED COST?

PROJECT SUMMARY

JUNE 2021

Across all of our Project Phoenix activities and actions we pay respect to the Traditional Owners and Custodians of the lands and waters on which we work. We honour the resilience and continuing connection to country, culture and community of all Aboriginal and Torres Strait Islander people across Australia. We recognise the decisions we make today will impact the lives of generations to come.

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EXECUTIVE SUMMARY

About the project

No consolidated review of national seed pricing exists. The absence of such data limits the capacity of the native seed industry to make investment decisions based on forecast or expected demand and limits the industry's ability to identify and quantify price efficiency gains as a result of investment and the removal of barriers.

The report *How much does native seed cost?* seeks to provide an insight into current native seed pricing in Australia.

Scope

The scope of the project was to:

- identify what information is available on the pricing of native seed nationally
- identify, where available, data on current market rates/prices and
- examine the suitability of a purity grading system (or other standards) for the relative valuing of seed.

Introduction

This project identifies what information is available on the pricing of native seed nationally and presents a baseline snapshot of pricing to inform the native seed sector and government about pricing issues.

This project presents:

- A snapshot of national pricing of native seeds capturing the variation of seed pricing across the sector and market stipulations including:
  - # sellers included in comparative analysis and
  - # species analysed for comparative prices.
- A review of native seed pricing across the sector credible to government agencies.
- The suitability of a purity grading system (or other standards) for the relative valuing of seed.

The report details a sub-set of suppliers whose data was publicly available on the internet. It is not a complete nor comprehensive report of native seed species or price but rather a snapshot based on available information.

Issues

Several issues were identified during the gathering and preparation of the combined dataset:

- There is no available information on which suppliers government procures native seed from.
- Several native seed suppliers also sell exotic or non-native seeds alongside their native seed lists. Unless specifically identified, it may not be possible to determine whether all species are native.
- Several native seed suppliers listed prices in non-convertible quantities (for example, $ per packet or without a quantities) which were excluded from the data.
- Data scraping relies on standard format price reporting — for example, a scraper which registers '$3.00 per 4 grams' will not recognise '$3.00 per 4g'. In cases where native seed suppliers list in non-standard formats, efforts were made to capture variations, however not all variations have been captured by the data scrapers.
  - In addition to non-standard price reporting, several websites used non-standard html tags — for example, placing 98 out of 100 prices within a table, and the remaining two as free text. In cases where native seed suppliers use multiple web formats, efforts were made to capture variations, however not all variations have been captured by the web scrapers.
- ACIL Allen has relied on native seed suppliers to accurately label their genera and species. Misspelled or mischaracterised species will be recorded as such.

Comment

Not applicable

Key outputs

The key outputs from this review are:

- the report *How much does native seed cost?*
- the number of unique species = 3,089
- the number of suppliers = 7,430 listings from 13 suppliers
- R script to download and process price data from supplier websites and/or lists of prices in a PDF format.

Outcomes

The outcomes of this project are:

- a review of native seed pricing across the sector credible to government agencies
- market stipulations/pricing and relationships to quality
- a snapshot of national pricing of native seed:
  - 3,089 species analysed for comparative prices
  - 13 sellers included in comparative analysis
- a dataset

Findings

In the absence of any available information on government procurement, the approach taken was to find any publicly available pricing information on native seed in Australia. Twenty-five websites were identified with information that could be used, but only 13 had information that could be collected in an efficient manner.

This data is credible as the sample contains a large amount of data across species (3,089) and price listings (7,430). It also contains:

- suppliers from around the country and
- a range of different business types from large commercial operations to smaller community suppliers.

This snapshot of pricing information for the native seed sector provides the following findings:

- The number of suppliers with accessible price data nationally is 13.
- These suppliers are split across all states and territories with the exception of South Australia and the Australian Capital Territory.
  - Victoria has the largest number of seed suppliers with publicly available price listings (5), followed by NSW (4).
    - Queensland, Western Australia, Tasmania and the Northern Territory have one supplier each.
  - NSW had the largest number of price listings (3,386 or 45% of listings) followed by Victoria (2,008 or 27% of listings) and Western Australia (1,879 or 25% of listings).
    - Queensland, Northern Territory and Tasmania account for the remaining 2% of price listings.
- Of the suppliers, 73% are commercial enterprises and 27% are community seedbanks. This classification is important as the pricing strategies across the two types of enterprises are quite different.
- The seed price listings cover 580 genera and 3,089 species.

  - the top listed genera are dominated by eucalyptus and acacia.
- Prices range from $0/kg to $715,000/kg with a median price of $450/kg.
  - Tasmania has the highest median price ($880/kg) and Victoria the lowest ($380/kg).
  - genera with the highest average prices per kilogram are hakea, dianella, grevillea, daviesia and lomandra.
- The jurisdictions with smaller numbers of listings (Northern Territory, Queensland and Tasmania) are dominated by the major genera (eucalyptus and acacia).
- NSW, Victoria and Western Australia provide a wider range of genera.
- Having access to transparent information on the quality attributes of native seeds allows for:
  - seed collectors/suppliers to price seeds appropriately (i.e. attract price premiums for premium quality seed) and
  - seed purchasers to make informed decisions so as to ensure that the seed they purchase is the best value for money for their intended purpose.

As efficient market development requires the provision of transparent information, this database will need to be updated and maintained over time.

This will require sourcing additional information from a broader range of native seed suppliers and with more frequency. The costs and benefits of sourcing, collecting, collating and promoting this information over time will need to be considered and it may be more practical to incentivise suppliers to provide information rather than sourcing it indirectly.

Evidence

Refer to the full report *How much does native seed cost?* for all references and appendices.

RECOMMENDATIONS

Key recommendations from this review are as follows:

RECOMMENDATIONS	
1	**Repeat this process annually to develop the database over time. Consideration should also be given to broadening the information search to:** • capture additional suppliers and genera • gather information on seed stocks.
2	**Promote the information provided in this database and continue to promote it over time as the database is expanded.**
3	**Incentivise disclosure of information direct from seed suppliers to reduce reliance on publicly available information to add reliability, robustness, breadth and depth to the information.**

WANT TO KNOW MORE?

For further information read the full report *How much does native seed cost?*

Related projects

- *Bushfire impacts — How much seed will I need?*
- *Bushfire impacts — Where will the seed come from?*
- *Psst... Everything you wanted to know about native seed licensing*
- *Everything you wanted to know about access to land for native seed collection*
- *Do we need a National Seed Code of Practice?*
- *How does the native seed market work?*

This project contributes to the evidence base for a ten-year strategy to guide the native seed and landscape sector. The document, which is untitled until endorsement in September 2021, is referred to as the Strategy in all Project Phoenix publications.

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