

Tree Seed
Summit 2023

Survey Results + Summary



**Note: Roughly 50% of submissions did not follow the provided directions and submitted answers with only a checkmark. Those answers have been converted to binary count.*

Results

QUESTION 1

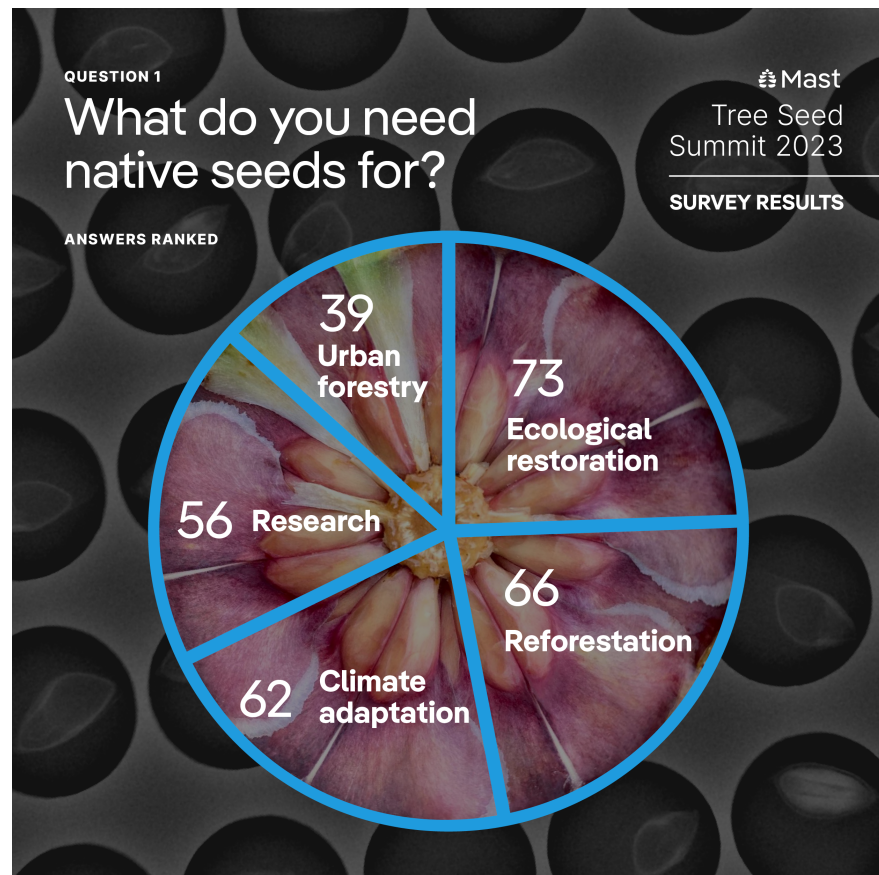
What do you need native seeds for?

Answers (ranked):

1. Ecological restoration [73]
2. Reforestation [66]
3. Climate adaptation [62]
4. Research [56]
5. Urban forestry [39]

Hand-written answers:

- Seed banking
- Sale to others
- Collect and sell cones or seed
- Timber industry
- Afforestation
- Money (cone collector)
- Conservation
- Nursery production



QUESTION 2

Currently, where do you source your seed?

Answers (ranked):

1. Wild seed lots [61]
2. Retail purchasing [53]
3. Personal collections [51]
4. Orchard seed lots [49]

Hand-written answers:

- We collect and sell seed/cone
- I do not source seed
- Natural regeneration
- Small, independent collections



QUESTION 3

What do you consider to be most important when prioritizing where to acquire seed from?

Answers (ranked):

- (1) My current inventory [70]
- (2) Other agency or organization's seed supplies [57]
- (3) Where I have projects [54]
- (3) Labor for collections [54]
- (4) Land access [43]



Hand-written answers:

- We collect / not plant etc
 - Potential for severe fire
 - Genetic population fire-risk (will it be here next year?)
 - Seed appropriate for where natural disturbances are happening, especially high heat fire
 - Goal of collection
 - Get seed from most genetically appropriate source, regardless of where the seed is purchased
 - Seed source (genetics, quality)
 - N/A - Cone collector
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Interpretation

Uses for native seed

In addition to traditional use cases for seed - with ecological restoration and general reforestation among the top - there were also expressed needs for banking, sales, timber (a specific application within reforestation), nursery production and afforestation. This alludes to a wide range of needs for seed, and may speak to the qualities in seed that different customers may be looking for. As an example, ecological restoration or climate adaptation may lend more toward diversity in terms of genetics and species, whereas timber or nursery production may seek different qualities. Ultimately, as we think about collections, it is important to acknowledge and understand all customer types and the various uses for seed, as this can guide decision making and planning for collections.

Sourcing seed

Wild seed lots stood out as the clear number one place for sourcing seed, with the other options falling in a similar ranking - retail purchasing, personal collections, and orchard lots. Other written answers included natural regeneration and small, independent collections. While wild collections was a distinctive top answer, it's worth noting that this could be a factor of the specific audience attending the 2023 TSS, and ultimately all

answers ranked similarly. However, due to a lack of seed in the industry, all options for sourcing seed should be made available, and able to fulfill the uses specified in the first question.

This also points to a requirement for a constant communication loop for stakeholders – those selling retail seed need to communicate with purchasers for an outlook on needs and demands, and in turn, they also need to communicate with foresters, land managers, and collectors to understand where collections in a given year will be feasible based on crop, labor, and access. As the industry invests in scaling seed supplies, it will be critical to consider how stakeholders across the seed supply chain communicate and depend on each other.

Prioritizing seed acquisition

Current internal inventories were ranked the most important when deciding where to prioritize obtaining seed. This was followed by other agency/entity supplies, projects, labor, and land access. Notably, multiple submissions also stated genetics and fire risk as factors for focusing seed procurement. This speaks to a need for having a full picture understanding of inventories across stakeholders, as well as where collections will be feasible (due to labor and access), along with highest needs in terms of optimizing for preferred genetics or genetic diversity, and mitigating risk around natural disturbances. Due to limited resources available for collections, the industry should aim for collaboration across agencies to identify prioritization of seed acquisition and enable data driven decisions based on all of the factors stated – including inventories, labor, access, genetics, likelihood of natural disturbance, and overall goals.