

Feasibility Study - Routes to Market for Community Tree Nurseries



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1 Executive Summary

This feasibility study explores market opportunities for community tree nurseries (CTNs) to expand tree and tree seed sales. Conducted as part of the Growing Diversity project, the study examines barriers to CTNs selling trees and assesses potential sales mechanisms. The aim is to support CTNs in accessing markets through recommendations of the best way forward for tree buyers, CTNs and government.

Key barriers for CTNs:

- **Visibility and Reputation:** Most tree buyers are unaware of CTNs, though interest in locally sourced trees is high. Increasing visibility through marketing and partnerships is essential.
- **Regulatory Barriers:** Understanding relevant regulations such as plant passporting, forest reproductive material (FRM) and Biosecure Procurement Requirement, create significant challenges, particularly for small CTNs.
- **Capacity Constraints:** CTNs often lack sufficient staff, skills (e.g., marketing and business planning), and funding, which limits growth and market access.

An overview of the key sales mechanisms:

- **Direct Sales:** The most common method but requires improved marketing to maximise sales potential.
- **Online Sales:** Offers potential new market but challenges with delivery logistics and administrative burden.
- **Contract Growing:** Provides income stability but requires tree buyers to plan much further ahead.
- **Wholesale:** Enables bulk quantities of trees to be sold but at a lower price than consumer sales.
- **Tree Seed Sales:** Relatively unexplored opportunity to address gaps in provenance zones and support CTN cash flow.
- **Collaboration:** Cooperative models or shared platforms could amplify CTN impact but would require careful (and potentially third-party) coordination to handle the complexity, and strong CTN buy-in to ensure success.

Key recommendations:

<u>Responsible Group</u>	<u>Recommendations</u>
CTN community and researchers	<ul style="list-style-type: none"> • The development, implementation and resourcing of a CTN hub to host resources relevant to CTNs, both to support CTNs and to help tree buyers learn about CTNs.
Woodland Trust	<ul style="list-style-type: none"> • Encourage uptake of UK and Ireland Sourced and Grown (UKISG) through increased marketing to CTNs.
Tree buying organisation	<ul style="list-style-type: none"> • Offer flexible and partial-fulfilment contracts, with minimum and maximum number on species within an order and allowing individual nurseries to fulfil part or a larger order.

<p>UK and devolved governments</p>	<ul style="list-style-type: none"> • Commit to funding support and accessible grants for CTNs when current funding period ends (March 2025), based on evidence gathered by CTN-related research projects. • Free or subsidised entry to Plant Healthy, with support of plant health experts to create scale-appropriate biosecurity protocols for CTNs, that meet existing biosecurity standards without excessive administrative burdens on CTNs. • Extend the Biosecure Procurement Requirement exemption form to include evidence-based low risk tree suppliers such as CTNs producing trees for local tree planting schemes and allow membership of the UKISG scheme as evidence of sufficient biosecurity measures in the “sourcing summary”. • The coordination of tree nursery regulations and standards to avoid the duplication of effort for tree nurseries, and or more accessible guidance and coordinated advice. To include Forest Reproductive Material (FRM) Regulations, plant passporting, Plant Healthy and Ready to Plant. • The streamlining of FRM requirements for seed testing to reflect small-scale seed collection and non-commercial forestry seed. Support for smaller seed collectors such as CTNs to engage with the system to enable them to sell seed.
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2 Context

2.1 Growing Diversity project background

The Growing Diversity project is being delivered as a collaboration between the Woodland Trust and Fellowship of the Trees and is funded by the Forestry Commission through the Tree Production Innovation Fund (TPIF). The project aims to unite and coordinate community tree nurseries (CTNs) within England to increase the production of difficult to source native tree species and provenances. Our project innovates by supporting CTNs to trial new approaches, share skills amongst their peers and access expert guidance. Key Growing Diversity workstreams include working with CTNs to:

- Gather seed in areas where little or no collection takes place.
- Understand and overcome barriers when propagating hard to grow species.
- Provide training and networking support.

This report is focussed on assessing and overcoming the barriers for CTNs to bring their trees to market.

2.2 Community Tree Nurseries

The CTN sector is small but growing, with an estimated 80 CTNs in 2023¹. The CTN sector is diverse in terms of the types of organisations. These include voluntary organisations, charities and community interest companies. Some CTNs are hosted by larger organisations and companies. Most CTNs are young, starting within the last one to three years, and 87% of CTNs in the national CTN survey said they plan to upscale production by 10% or more¹.

Forest Research¹ has defined a CTN as: ‘An enterprise, social enterprise, community-based group, charitable or public sector endeavour or network where volunteer community members and groups take part in growing trees, including seed/wilding collection, nursery management and sales/distribution, and also in some cases planting out’. They identify four types of CTN: Organisation and project-based; Enterprises; Community-based and Networks.

2.3 Importance of local provenance

The UK imports a vast and growing number of trees, with the value of imports more than doubling from £110 million in 2021 to £242 million in 2022 - compared to just £6 million in 1992². Between 1971 and 2000, five new tree diseases were detected in the UK, while between 2000 and 2024 this figure rose to 21. Producing local trees from local seed significantly reduces the risk of importing new diseases, while ensuring trees are better adapted to local conditions and support local wildlife³. The UK Forest Standard states, “When planting native species and native woodland, it is generally best to use well-adapted local or regional origins from similar elevation”⁴. CTNs can play an important role in ensuring local provenance because the majority of CTNs focus on growing local trees from local seeds and sell or give away trees in their local area.

2.4 Aims and objectives

This purpose of the feasibility study is to appraise options to:

- (i) better enable CTNs in England to bring their trees to market;
- (ii) enable large tree buyers such as land owning eNGOs, public bodies, silviculture companies, and Local Authorities to easily purchase the trees they need from their local CTNs.

3 Methodology

The methodology for this report involved examining a range of sources to provide a comprehensive understanding of community tree nurseries (CTNs) and their current access to markets, alongside further engagement with the CTN and tree buying communities.

3.1 Literature Review

The following sources were used in the literature review:

- Reports from Forest Research, Fellowship of the Trees and Growing Connections (TPIF project delivered by Coventry University) were analysed to gain an overview of the existing CTN setup.
- Online sales platforms were reviewed to assess their relevance and potential for CTN engagement.
- Relevant government policies and guidance, including accreditation processes, were considered to understand the regulatory barriers to market access for CTNs.
- Tree supply data were gathered from national and regional reports, including a regional report for the West Midlands⁵ and national figures from Agriculture in the UK 2023 dataset².
- Insights were drawn from CTN-related projects such as CommuniTree.

3.2 Stakeholder Engagement

Stakeholder engagement for this report involved a combination of surveys, interviews, and collaborative discussions. An initial CTN OpenSpace session, facilitated by the Fellowship of the Trees Community Tree Nursery Collaborative (CTNC), introduced the project and gathered preliminary feedback from CTNs. This was followed by a CTN survey (Appendix A). The survey was distributed by the Fellowship of the Trees Growing Diversity Project Coordinator Hilary Campbell and resulted in 16 responses. In-depth interviews were conducted with two CTNs to gain further detailed insights.

A second survey (Appendix B) invited tree buyers to share insights on their purchasing methods and views on potential future mechanisms and received four responses. Additionally, an in-depth interview with the Woodland Trust procurement team, representing tree buyers from several other environmental NGOs, provided further perspectives on tree procurement needs and challenges. This was supported by data from the Growing Connections tree buyers survey and focus groups, which had 121 responses.

An existing national CTN stakeholder group was consulted, chaired by Defra and including representatives from the Tree Council, Woodland Trust, Coventry University, Fellowship of the Trees, International Tree Foundation and Norfolk County Council.

3.3 Assessing the options

Options for increasing the market for CTN trees were developed using the insights gathered in the above sections and analysed against the impact on CTNs (measured through survey and interviews, such as percentage of CTNs willing to engage with each option) and the effort involved in pursuing the option. A score was then obtained by multiplying the effort score (1 = high effort, 10 = low effort) by the impact score (1 = low impact, 10 = high impact), with the highest resulting scores being considered the best options to pursue.

4 Current Market Setup

4.1 Sales mechanisms used by CTNs

Of the 15 CTNs currently producing trees who took part in a survey commissioned as part of this report, just six (40%) currently sell trees. This mirrors previous research – in Forest Research’s *Social Research for Community Tree Nurseries*¹ paper, 7/16 (44%) CTNs used as case studies in 2021 sold trees. All six CTNs selling trees want to expand their tree sales, and of the eight not selling trees 6/8 (75%) want to start selling trees. No surveyed CTNs currently sell tree seed, though half would consider it in the future.

Of those CTNs who currently sell trees, direct local sales is the most common mechanism. This is typically onsite sales at the tree nursery site, with some CTNs selling directly into local tree planting projects. Of the six CTNs who sell trees, just one (17%) sells trees online – though this is just an advertised stock list and all orders are taken by email. None of the respondents offer delivery, though one CTN (17%) is considering delivery. Some CTNs sell to wholesalers such as garden centres⁶ and one large CTN interviewed for this report is about to start selling trees to a commercial nursery.

4.2 Barriers to accessing market and buyers

4.2.1 Visibility and reputation

A national survey of tree buyers (n = 121), undertaken as part of the Growing Connections project, highlights that most tree buyers are unaware of CTNs⁷. Just 13.3% (n = 16) of tree buyers surveyed currently buy from CTNs, with 72% of those who don’t buy stating their main reason is not aware of CTNs, and 25% reporting there are no CTNs available locally. This mirrors the CTN survey in which finding the customers was identified as the joint biggest barrier to tree sales (8/16 CTNs, 57%). Encouragingly, 91% of buyers who don’t currently use CTNs would consider it in the future.⁷ Of those who were aware of CTNs, 63% found their local CTN by word of mouth, suggesting both that continuing to develop local advertising and partnerships, and a greater online presence, would help CTNs become more visible.

The main requirement of tree buyers is tree quality (69% essential, 30% important) followed by availability (51% essential, 44% important). Evidence of biosecurity was also important (46% essential, 30% important). When asked for reasons for not buying from CTNs, lack of regular supply (16% overall, 28% of organisational buyers), quality concerns (12% overall, 23% organisations) and biosecurity concerns (13% overall, 23% organisations) were all mentioned. This highlights that the reputation of CTNs is also currently a barrier, though much less than visibility.

4.2.2 Government policy and legislation

The Forest Reproductive Material (FRM) Regulations⁸ applies to the sale of seeds or trees of 46 controlled species in the UK, which includes several common native species such as oak (English and sessile), birch (downy and silver), hornbeam, beech, Scots pine and wild cherry. There is a further list of voluntary control species which includes most other native trees. Following FRM regulations presents a significant administration cost, leading some CTNs to instead choose to give away their trees to avoid it. For selling tree seed, the regulations state it must first be tested – there are currently only three organisations approved to do this: Maelor Forest Nurseries Ltd, Forestart Ltd and Scotia Seeds Ltd⁹.

Unless selling directly to the end user (in-person) nurseries must also adhere to plant passporting¹⁰ regulations. The inspection fees are not scale-dependant, with a fee of £61.58 per 15 minutes (including

travel time of inspector) and a minimum fee of £123.16. This cost creates a significant barrier for CTNs to upscale beyond local direct sales, into potential larger markets such as online sales or joint selling.

The Biosecure Procurement Requirement Pilot¹¹ requires that trees purchased as part of any of the five tree planting grants come from a nursery with Plant Healthy certification or from a consignment with a Ready to Plant certificate. An exemption form exists if trees are donated. As of December 2024, just two CTNs are currently registered with Plant Healthy, one is awaiting final accreditation and a few more have begun the process. For the majority of CTNs, these schemes are not scale-appropriate and are cumbersome to navigate, with much of the information not relevant to small nurseries who for example do not import seed or trees. This means that CTNs, especially small and medium sized, are effectively barred from selling trees for government grant-funded tree planting schemes. The Ready to Plant assessment can allow CTNs to still participate (cost is based on consignment value, currently 15%) where the size of an individual order justifies the time and cost.

These systems are administered by different government departments and organisations, and as there is no centralised advice service available CTNs often report find the current systems difficult to navigate. This increases the administrative burden on CTNs who must provide the same information in different formats to adhere to the different schemes and regulations. Understanding the relevant regulations was identified as the biggest barrier to selling trees or increasing tree sales in the CTN survey (8/16, 57%).

4.2.3 Procurement policies of tree buyers

Anecdotal and interview evidence suggests many large-scale tree buyers prefer to source all their trees from one supplier per project/planting scheme, and procurement policies and procedures can make it difficult to use multiple smaller suppliers.

4.2.4 Capacity restraints

Capacity restraints can broadly be placed into three categories: time, knowledge and financial. The average CTN has 1.22 full time equivalent staff members¹. This is influenced by some CTNs having high numbers of staff (range 0-10), with the majority having no staff members. Due to the nature of volunteering, it is difficult to maintain continuity, particularly for administrative tasks such as adhering to rules and regulations. Due to the range of skills needed to run a CTN, it is likely some will be lacking amongst the key staff and volunteers, in particular marketing and business planning skills. Cash flow constraints are common due to the time and money invested for up to three years before tree sales, and many CTNs close during this key early establishment phase.

5 Developing sales mechanisms

Markets for tree sales can be broadly broken down into three categories:

- Local sales (Section 6)
- Online/postal sales (Section 7)
- Contract growing (Section 8).

These are discussed in turn below, as well as a separate section for selling tree seed (Section 9). **Figure 1** below presents a decision-making flowchart for tree and tree seed sales for CTNs.

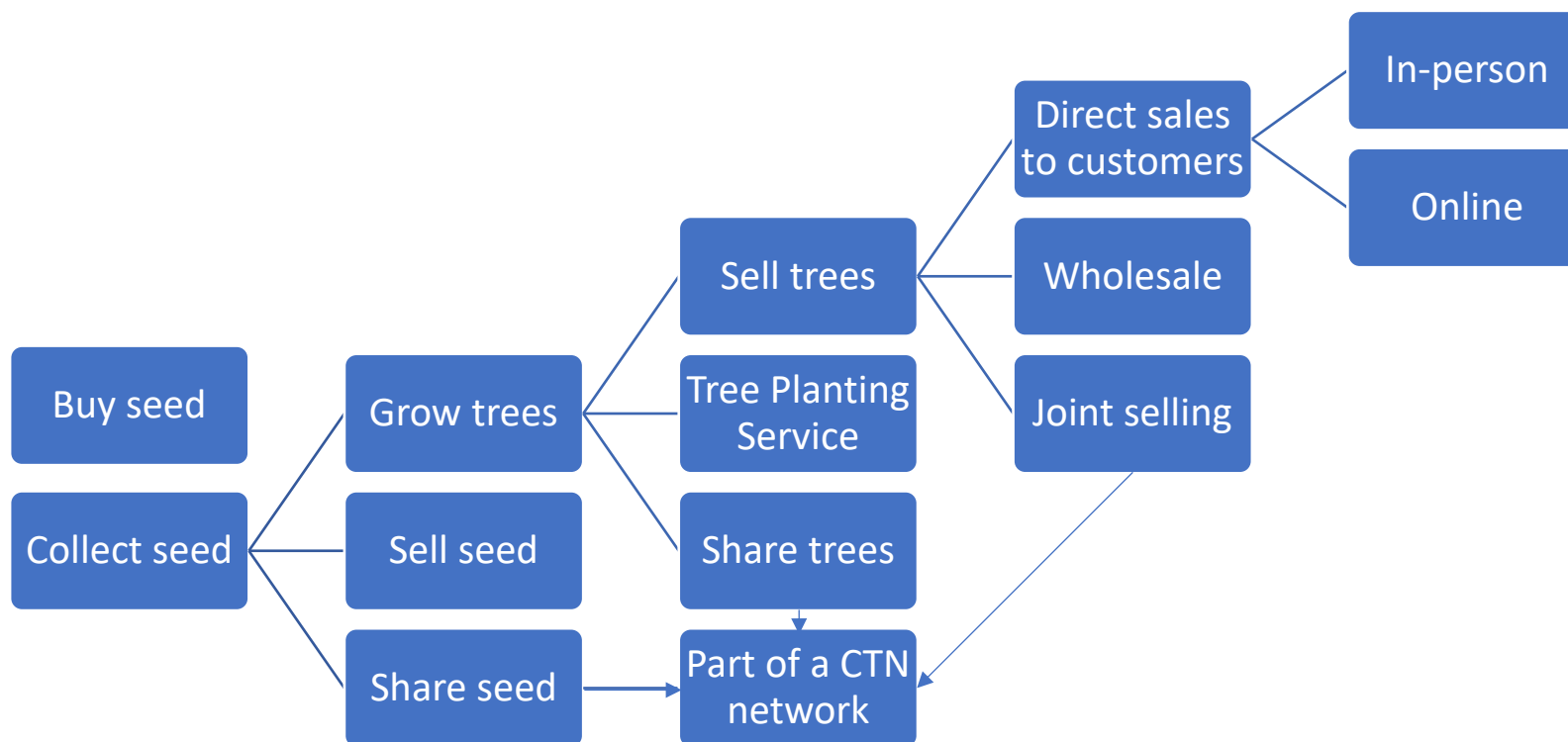


Figure 1 Decision-making matrix for sale of trees and tree seed for CTNs

6 Local sales

One market for trees is local sales, sold directly to the end customer.

6.1 Mechanisms for local sales

- Phone orders: need someone to be able to answer but can be fast for customer and a chance to talk about the CTN, more personal.
- Email orders: Easier to coordinate sales as can check stock list then respond to everyone. Customer is waiting longer but it may be more convenient for buyers. Can semi-automate using automatic replies with links to for example latest stock list but needs to be kept up to date.
- Face-to-face sales: Need people available to greet customers at the nursery site (can be a service available only at certain hours/days) or can take trees to other areas such as local events to try and sell. Helps build a personal relationship but is the most time intensive, and regular customer visits can distract from the tree growing.

6.2 Delivery options

Decide between pick-up only (and whether to set defined times/days) or offer own delivery. Own delivery would work well when offered alongside a tree planting service. The use of external delivery would require compliance with plant passporting and is discussed in Section 7.

6.3 Marketing for local sales

All forms of local sales require customers to firstly know about the CTN, and secondly know what they have in stock. Physical marketing can include attendance of local events, local advertising such as posters, and open days at the tree nursery. Online marketing can include a website and or social media page. A central CTN hub could host a national map of CTNs that can help people find where their local CTN is. CTNs can also register on the Forestry Commissions [Forest Nursery Directory](#), and signup with the Woodland Trust as a UK and Ireland Grown and Sourced (UKISG) registered nursery, to be displayed on their webpage for increased exposure, alongside other benefits such as advice on biosecurity.

7 Online and Postal Sales

Any form of online or postal sales, including coordinated sales between nurseries, will require [plant passporting](#). This includes a significant annual inspection cost, and the time needed to administer the passports. However, online and postal sales are likely to be a significant potential market and suits the needs of many customers who want ordering trees to be quick and easy. It also increases the ease of CTNs selling trees together to a single customer. One CTN surveyed is already selling trees online (6%) and a further 8 (50%) would consider it.

The stock list can be updated automatically as orders are placed (using e-commerce and website builders, requires updating regularly if also selling via other methods) or online orders can be confirmed manually as with email/phone orders. There are typically fees for online payment but this option may be easier for customers and CTNs than payment on collection, and it enables delivery as the payment is received upfront.

7.1 E-commerce

E-commerce platforms enable trees to be sold online, either built into a website or as a stand-alone platform – the best three options identified are outlined below in **Table 7-1**. An individual CTN can have a website, or there could be a website as a local or even national cooperative of CTNs. A joint website/platform could take several forms, such as listing all CTNs stock separately for buyers to choose or listing by tree species and then a coordinator ensures these are delivered by individual CTNs. Creating a website, even if using web builders, requires significant resource and attention to detail.

A joint platform would reach a wider audience but requires either a lead coordinator such as a CTN network, individual CTN, or environmental NGO. Another option is for each CTN to commit to regularly updating their stock list and organising their own deliveries, such as how [Plant Market](#) works (see **Table 7-2**). Combined sales may lose some of the benefits of local markets and local trees, but the trees are still UK grown (reduced biosecurity risk of importing trees) and enables larger orders to be filled.

Table 7-1 Shopify Products and Prices (October 2024)

<u>Name and Description</u>	<u>Monthly costs, pro's and con's</u>
Shopify E-commerce only without website	Starter: £5 per month, plus 5% transaction fee per order. Basic: £19 per month, plus 2%+25p transaction fee per order for online sales and 1.7% for in-person sales. Shopify: £49 per month, plus 1.7% +25p transaction fee per order for online sales, 1.6% for in-person sales. + Easy to setup, range of price options for small, medium and large CTNs. - Fees for online sales higher than other options. Best option for smaller CTNs where a website is not needed. It is the quickest and easiest way to sell trees online and accept card payment.

<p>Wix</p> <p>Website builder with e-commerce</p>	<p>£16 per month, plus 2.1% + 20p transaction fee per order, plus an additional £10-20 per year for a custom domain name.</p> <p>+ Can build a professional website and start selling online.</p> <p>- Reasonably high cost, and time cost of putting content on website.</p> <p>Good option where CTNs want to share information, for example about their organisation or project, rather than just have tree sales.</p>
<p>Square Online</p> <p>Website builder with e-commerce</p>	<p>Free version has basic features, 1.4% + 25p transaction fee per order.</p> <p>Plus version is £20 per month, plus 1.4% + 25p transaction fee per order, with extra features for the website.</p> <p>+ Free option available, lowest transaction fees.</p> <p>- Lacks built-in point of sale feature of the Shopify e-commerce options (for in-person card payments) but can link to another provider to offer this.</p> <p>Most cost-effective option for CTNs –no monthly cost (unless additional features needed) and lowest transaction fees (where orders exceed £7) of all options.</p>
<p>Prices correct as of 10 October 2024. Other services and pricing options available but these are the best options identified for CTNs.</p>	

7.2 Sell on existing platforms

There are several existing sales platforms operating in the UK, with just one, Plant Market, specifically selling just plants. The main options are outlined in **Table 7-2**. Most organisational tree buyers buy direct from nurseries, predominantly by phone or email, and the following are likely to serve small individual customers.

Table 7-2 Existing Sale Platforms (October 2024)

<u>Platform</u>	<u>Cost to use</u>	<u>Offer delivery</u>	<u>Likely market</u>	<u>Comments</u>
Amazon	Various costs, amounting to 15.3% of total sale including delivery, plus £25 per month or £0.75 per item	Yes. Amazon charge customer £4 + £0.50/kg and give this to the seller, but seller must still pay 15.3% of this back to Amazon	National	Very few trees sold this way so buyers unlikely to check, and fees are prohibitively expensive

eBay	30p per listing (can sell multiple of same tree on one listing) or pay monthly: £27 (250 listings then 10p per each), plus 11.25% +30p per order	Yes (seller sets amount)	National	Depends on quantity sold, as fees are per order not per item. Listing cost cheap if selling larger quantities or each tree species, but high fees per order
Etsy	£0.15 per listing, then 10.5% +£0.20 per item	Yes		Mostly plants, not many trees sold here, fees only worthwhile for higher value trees such as standards
Facebook Marketplace	Free for collection only, 2.9-3.49% transaction fee for online payments	Yes	Local (collection only) National (delivery and online payment)	Can be a good option where CTNs don't want to invest in own website/e-commerce
Gumtree	Free	No	Local	Good option for small value local sales, but unlikely to attract larger buyers
Plant Market	Unknown (enquiry sent).	CTN must offer delivery	International	Stock list must be updated every two weeks. Europe-wide sales platform for plant and tree nurseries.

7.3 Postage and packaging

Unless all customers are local and the CTN chooses pickup only, the delivery of trees needs to be considered. There are three main options, using own delivery, using a postal service or relying on customers to organise their own delivery. All delivery options require [plant passporting](#). 50% of tree buyers surveyed would only buy if the nursery offers delivery and the remaining 50% would prefer the nursery to organise delivery. However, 5/6 CTNs who currently sell trees would not consider offering delivery.

7.3.1 Own delivery service

The main cost is the use of a vehicle – either bought, rented, or using an existing vehicle from CTN staff or volunteers. Another option is to make arrangements with a third party such as a local farmer for delivery. This system can work well where the customer base is predominantly local, and large orders are made. It can also be combined with offering the service of tree planting. Trees must still be transported in a way that minimise the risk of damage – watered well beforehand, well secured and bagged and tied if bare root to avoid the roots drying.

7.3.2 Using a postal service

This is currently the most common option used by tree nurseries selling online. The CTN must ensure the packaging is adequate for transport, or they can buy packaging from the postal service they choose. Prices vary widely by size, weight, speed of delivery and delivery company – see **Table 7-3** for a guide price table using Royal Mail. For small quantity orders, postage costs are very high, and so would have to be passed onto the customer.

Tree nurseries who have online sales use a variety of pricing mechanisms for delivery, either charging by weight, number of trees, or by order value. Some offer free delivery with the higher tree price often reflecting this. The price charged to customers must allow for the delivery cost, the costs of packaging material and the time taken to get the trees to the delivery company – some, such as Royal Mail, offer free pickup but there is still an admin time cost to the CTN to arrange this.

Delivery of live plants comes with a risk of damage – Royal Mail tracked delivery comes with insurance of up to £150, so above this it may be worth CTNs seeking additional insurance. Processing refunds where damage does occur in transit presents additional administration costs to the CTN.

Table 7-3 Cost of tree delivery using Royal Mail (October 2024)

Type of delivery	Number of trees	Cost of delivery	Cost per tree
24 hour tracked	Up to 15	£5.99	5 trees: £1.20
	Up to 75	£7.69	10 trees: £0.60
	Up to 150	£12.19	20 trees: £0.38
			50 trees: £0.15
			100 trees: £0.12
			150 trees: £0.08
48 hour tracked	Up to 15	£5.15	5 trees: £1.03
	Up to 75	£6.65	10 trees: £0.52
	Up to 150	£10.55	20 trees: £0.33
	Up to 75	£7.38	50 trees: £0.13

	Up to 150	£11.89	100 trees: £0.11 150 trees: £0.07
The above uses average weight of 20-60cm tall cell-grown trees, from Exmoor Trees. Bare root trees will vary depending on height and girth, but weight will be lower for comparable sizes. Prices for Royal Mail correct as of 10 October 2024, other companies and delivery options available.			

7.3.3 Customers organise own delivery

This option may reduce the time burden on CTNs, but they would still have to liaise with the delivery company around pickup time, and the extra hassle is likely to put off many customers.

7.4 Marketing for online sales

Online tree sales are a competitive space, so CTNs would do well to develop a niche in the market. Most CTNs already have several unique selling points (USPs):

- Reduction in Biosecurity risks due to local growing and seed collection - assuming they don't accept donations of "holiday trees" (i.e. trees collected or purchased from abroad during a holiday).
- Plants climatized for their final planting location (only applies to local sales).
- Reduction in carbon due to less transportation (applies predominantly to local sales and where local seed is collected).
- Local seed provenance.
- Local Employment - average of 1.22 FTE (full time equivalent) staff per CTN.
- Engagement with the local community.

In addition to the above that the majority of CTNs will satisfy, further USPs can be developed:

- Specialised production – e.g. growing standards, local tree varieties, rarer species.
- In-house relationship with end user – can include tree planting and aftercare.
- Education – both informal and through events and training courses.
- Value of environmental credentials – e.g. organic/permaculture growing methods.

Marketing can be at an individual CTN level, or as part of a network or cooperative, with multiple CTNs working together to advertise and with the option of jointly fulfilling larger orders. A concept note has been created by the International Tree Foundation about a funding bid for the development of a CTN hub which has the potential to significantly raise the profile of both individual CTNs who sell trees (via a map) and CTNs in general (via information on what CTNs are). As well as signposting potential buyers to CTNs, the hub can also host resources for CTNs that can include support for marketing plans and development of local partnerships to aid tree and tree seed sales. CTN networks – both national and local – can play a key role in promoting CTNs.

8 Contract Growing and Wholesale

Contract growing is where an order is placed well ahead of time, so CTNs can then collect the required seed and grow the trees. This can form a good baseline or recurring income for a CTN and give certainty over which trees to grow. Wholesale is the sale of bulk quantities of trees to an intermediate organisation or to a retailer such as a garden centre. Wholesale can be grown to order or may be negotiated at a later stage once the trees have been grown.

There is a risk that trees destined for sale in advance do not grow adequately or die due to environmental conditions including irrigation (lack of or overwatering), heat, wind, pests and diseases. Seed germination is also highly variable and so it is likely that far more trees will need to be grown than the size of the order.

Another option for contract orders is minimum/maximum quantities per tree, and an overall number. This would offer the flexibility for failures in particular species, both in seed germination and in the latter stages of growth, and still enable the order to be fulfilled and retain a good relationship with the customer.

Contract growing can suit both individual CTNs and CTN networks. For networks, larger orders (for example, trees for the Woodland Trust free tree packs, or for larger developments) could be fulfilled by CTNs working together. Alongside some specialisation in particular species, it would be wise for several of the CTNs to also grow the same species, so that any issues at one nursery does not impact the whole order. In years with no losses, excess trees can be sold via the other markets discussed in sections 6 and 7, or donated to local causes. Delivery of tree packs would present additional administration costs to CTNs.

Contract growing can be direct to end customers, as with local sales, or can be to a wholesaler. Wholesale trees will receive a significantly reduced price, but are likely to be purchased in larger quantities, so would only be suitable for enterprise CTNs who are looking to grow at large scale to generate an income.

8.1 Marketing for contract growing

Contract growing requires tree buyers to plan several years ahead, and so would work well by developing strong partnerships both locally and nationally. A good starting point for local partnerships is Local Authorities (LAs), some of whom already support their local CTN(s), by buying all or most of their trees. Local landowners and developers may be another option, as well as local community woodlands or other tree planting groups.

8.2 Marketing for wholesale

Wholesale would suit large CTNs who wish to sell bulk quantities of trees, where they are able to produce trees at a lower cost. Building relationships with local retailers such as garden centres would be a good place to start. Developing relationships with larger tree nurseries can be mutually beneficial, particularly where the CTN can demonstrate a niche, such as local provenance, and/or specialist tree species currently underserved by the commercial growers.

9 Selling Tree Seed and other secondary markets

CTNs can develop a market for tree seeds, both to other CTNs and to commercial nurseries. This can help increase the genetic diversity of trees grown in the UK and provide a useful income. There is a CTN in Wales that generates sufficient income from selling seed to cover all other business expenses, such as insurance and woodland activities.

To sell tree seed CTNs would need to engage with the Forest Reproductive Materials (FRM) Regulations and currently need to send their seed for testing if they are a controlled species, which includes common native trees such as English Oak (*Quercus robur*), Sessile Oak (*Quercus petraea*), Silver Birch (*Betula pendula*), Downy Birch (*Betula pubescens*), Rowan (*Sorbus aucuparia*), Hazel (*Corylus avellana*), Wild Cherry (*Prunus avium*) and Alder (*Alnus glutinosa*). CTNs can consider selling seed for non-controlled species without the need for seed testing. Seed testing must be carried out by one of the four approved organisations: Maelor Forest Nurseries Ltd, Forestart Ltd, Elsoms Seed Ltd or Scotia Seeds Ltd⁹.

9.1 Marketing for selling tree seed

The key here is to develop relationships with other nurseries. On a small-scale CTNs can sell seed to local nurseries, perhaps a surplus that they cannot grow themselves due to capacity constraints. On a larger scale, and to generate more reliable income, CTNs could look to sell specific seed to larger nurseries, both CTNs and commercial. This can be aimed at nurseries who do not collect their own seed or the CTN can specialise in seeds of certain species and provenance zones that are underserved by the current market.

Apart from a few large commercial nurseries – and most CTNs – who collect their own seed, the seed market is dominated by one supplier, Forestart. There are currently gaps in provenance zones and species that can create a niche for CTNs. One commercial nursery, Elsoms Trees, has already proactively contacted some CTNs to ask to buy seed. The Scottish Forestry Grant Scheme (SFGS)¹² specifies that trees must be of local provenance where possible, which can create a market for local seed. This is in contrast to English tree planting grants that do not currently specify local provenance trees, though it is encouraged.

9.2 Related secondary markets for CTNs

To diversify income from tree-related activities, CTNs can offer related services:

- Planting and aftercare service: This can be an added fee per tree for planting and or aftercare, or have a cost per established tree, with failures replaced by the CTN. This can provide a stable income for CTNs alongside tree sales. Some government grant schemes pay for aftercare including weeding, watering and tree replacement – even where current regulations exclude CTNs from directly supplying the trees, they could engage with grant recipients to offer the planting and aftercare for trees purchased elsewhere.
- Offer woodland design (where relevant skills exist), which the CTN can then grow the trees for.

10 Options for CTN Markets

Based on feedback from CTNs and tree buyers from the respective surveys, and 1:1 interviews, the following options have been considered:

- Option 1: Individual direct sales (Section **10.1**)
- Option 2: Individual online sales (Section **10.2**)
- Option 3: Selling tree seed (Section **10.3**)
- Option 4: Contract Growing (Section **10.4**):
 - Option 4A: Direct contracts
 - Option 4B: Partial-fulfilment contracts
 - Option 4C: Flexible contracts
- Option 5: CTN cooperative (Section **10.5**):
 - Option 5A: Local/regional cooperative, direct joint sales
 - Option 5B: Local/regional cooperative, direct and online joint sales
 - Option 5C: National cooperative, direct joint sales
 - Option 5D: National cooperative, direct and online joint sales
- Option 6: TreeBay – marketplace for buyers and sellers (Section **10.6**)
 - Option 6A: Manual system
 - Option 6B: Automated system

These options are not distinct – there is a crossover between some options and options can also be combined.

10.1 Option 1: Individual direct sales

Direct sales continue to be the primary selling mechanism for community tree nurseries (CTNs), offering a low-effort approach to sustaining current practices. However, there is significant potential to support CTNs in expanding their local networks through targeted business development and marketing training, such as the training videos provided by the Fellowship of the Trees Community Tree Nursery Collaborative (CTNC). Just 13% of tree buyers currently buy from CTNs⁷ with 72% stating lack of awareness of CTNs as the main reason, but 91% of these tree buyers stated they are willing to buy from CTNs in the future. Therefore, raising awareness of CTNs at both a local and national level can significantly increase the potential market for their trees. CTN networks can be a key driver to increase awareness of CTNs – both existing national network the CTNC (led by Fellowship of the Trees) and the creation of new local and regional networks.

Establishing a centralised CTN hub could further amplify these efforts by raising awareness of CTNs, highlighting their benefits, and connecting buyers with sellers to strengthen market relationships. At its core, the hub could serve as an information platform, outlining the purpose and value of CTNs while providing contact details for existing nurseries. Additionally, it could act as a resource centre, offering practical tools such as templates and training videos to empower CTNs in building and sustaining their local markets.

10.2 Option 2: Individual online sales

Individual CTNs could explore selling online using methods outlined in Section 7, with one or two CTNs trialling the system to refine processes and develop more comprehensive guidance. 50% of surveyed CTNs would consider online sales and 1 CTN (6%) is already doing it. However, 83% of CTNs surveyed for this project are not considering offering delivery, so this is likely to be a pickup only service, reducing the potential market size.

Offering delivery alongside online sales is particularly suited to larger CTNs that are prepared to engage with plant passporting requirements and implement robust systems for plant health and packaging care. The cost of web-hosting, and especially taking payment online (Section 7) will impact negatively on margins, although it may be possible to charge a higher price per tree. The service is expected to attract smaller, individual buyers, resulting in multiple smaller orders that cater to diverse needs. Creation of online sales will require upfront costs and a heavy administration burden on CTNs, and it is difficult to assess the likely size of the market created. Most organisational tree buyers buy direct from nurseries, predominantly by phone or email.

10.3 Option 3: Selling Tree Seed

The tree seed market presents an opportunity to CTNs, as many seed zones are underserved by the current market, and evidence suggests that seed provenance is becoming an increasingly important requirement of tree buyers. Although no surveyed CTNs in England currently sell tree seed 31% (5/16) would consider it.

CTNs would need to engage with the Forest Reproductive Materials (FRM) Regulations and currently need to send their seed for testing if they are a controlled species, which includes common native trees such as English Oak (*Quercus robur*), Sessile Oak (*Quercus petraea*), Silver Birch (*Betula pendula*), Downy Birch (*Betula pubescens*), Rowan (*Sorbus aucuparia*), Hazel (*Corylus avellana*), Wild Cherry (*Prunus avium*) and Alder (*Alnus glutinosa*). CTNs can consider selling seed for non-controlled species without the need for seed testing.

There are currently only four organisations approved to test the seed of controlled tree species⁹. Some of the current testing is aimed at productive forestry trees and is inappropriate for native tree species grown for conservation schemes, which represents the majority of CTN seed gathering activity. Engagement with the Forestry Commission to support small-scale seed collection and refine their systems would increase the ease of CTNs selling tree seed in the future. One option would be to setup a government tree seed testing facility that is operated on a full cost recovery basis, reducing the costs for seed sellers. The potential market for CTN-collected seed would be commercial tree nurseries (for example, Maelor Nursery who do the seed testing themselves) and the seed company Forestart, who may be interested in buying seed from provenance zones they do not currently cover.

Some CTNs in Wales already sell tree seed, and training courses on selling seed have been run as part of the [CommuniTree](#)¹³ project. Their website has resources on collecting tree seed to sell to a registered trader and collecting tree seed for direct selling. With these resources the effort of individual CTNs to begin selling seed is greatly reduced, and either selling surplus seed or increasing seed collection directly for sale can provide an income opportunity for CTNs, especially useful to improve cash flow until tree sales later in the year.

10.4 Option 4: Contract Growing

Contract growing can be a good option for both CTNs and tree buyers. Tree buyers needs are varied and the evidence highlights difficulties in finding the tree stock they need^{5,7}, particularly for certain seed provenance zones and species not commercially grown. Contract growing gives the CTNs a certainty of income and allows better planning of what to grow. Three forms of contract growing are discussed below. Each could be combined with a CTN cooperative (Section 10.5), allowing tree buyers to have a contract with one entity but allowing several CTNs to grow trees towards the same order.

10.4.1 Option 4A: Direct contracts

The simplest form of contract is a direct growing contract between a tree buyer and an individual CTN. This allows strong partnerships to be formed and works well for local organisations or specific local projects.

10.4.2 Option 4B: Partial-fulfilment contracts

To enable CTNs to be part of larger orders, partial fulfilment contracts can be offered, where individual nurseries can bid to deliver part of a larger contract. The Woodland Trust are looking to trial partial fulfilment contracts for their UKISG accredited nurseries. The Woodland Trust buy several million trees every year, currently higher than the total known production of CTN trees, and so this presents a significant opportunity for CTNs.

10.4.3 Option 4C: Flexible contracts

To reduce the risk of CTNs not being able to meet a forward order, due to low seed availability, low germination success, or losses during the growing stages, flexible contracts can offer minimum and maximum quantities of each species required, with a total overall number of trees (this can also contain some flexibility where specific schemes allow). Losses in one species can be compensated by extras in another, within the given bounds.

10.5 Option 5: CTN cooperative

CTNs can work together in joint orders through a cooperative scheme. This can be a formal legal structure or more informal arrangement and is likely to work best with one nursery or organisation taking the lead. Alongside access to larger orders the cooperative can share administration, and at a local level can share staff, volunteers and equipment. 69% (11/16) of CTNs surveyed would consider joint sales and 13% (2/16) would consider becoming network leads. A cooperative could take many forms, with four options discussed below.

10.5.1 Option 5A: Local or regional CTN cooperative with direct sales only

This is the easiest cooperative option, building on the direct sales for individual CTNs (Section **10.1**). CTNs within a locality or region can help each other fulfil contracts, with the cooperative itself taking the lead (where resources allow a manager to oversee the cooperative) or individual CTNs taking the lead on different orders and then sourcing any trees they do not have from other CTNs. This option can be combined with contract growing (Section **10.4**) and can allow strong local partnerships to be developed. Key partners such as Local Authorities and local e-NGOs could form part of a wider network supporting the cooperative.

10.5.2 Option 5B: Local or regional CTN cooperative with direct and online sales

Building on option 5A (Section **10.5.1**), this option adds online sales. Although this would open a new market for CTNs, the administrative burden of online sales, particularly within a cooperative model, would be high. CTNs would need to commit to keeping their individual stock lists up to date and find a way to share the cost of webhosting.

An automated online system could adopt a straightforward model, such as the [Plant Market](#) approach, where each nursery lists its stock separately and manages its portion of an order, minimising the administrative burden. Each CTN who receives part of an order stock can receive a notification, which can be delivered separately by each nursery to the buyer. However, most CTNs would not consider offering delivery so coordination of joint orders remains a significant challenge.

A more complex approach where online orders could be centralised (using either an algorithm or manual administrator to coordinate each order with the nurseries) would mean greater ease of use for tree buyers but more complexity for CTNs. It is likely that a simpler system would better suit more CTNs.

10.5.3 Option 5C: National CTN cooperative with direct sales

Same as option 5A (Section **10.5.1**) but at a national level. This would open new markets and allow much larger orders to be fulfilled by CTNs but would be complex to setup and administer. Individual CTNs can take the lead on

different orders, but ensuring uniformity and organising delivery to the customer would be a challenge. There is also a risk that national orders reduce some of the key benefits of CTNs around local tree provenance, community links to tree planting and reduced carbon cost of transport.

10.5.4 Option 5D: National CTN cooperative with direct and online sales

Same as option 5C (Section 10.5.3) but at a national level. With a much wider range and number of CTNs any online sales system would become complex, and the risk of non-fulfilment of orders due to an individual CTN not updating their stock list regularly would be greater. It is advised that a cooperative should be trialled at a local or regional level first, with lessons learnt allowing the development of a national model, if deemed appropriate.

10.6 Option 6: TreeBay – system to match buyers and sellers

An online sales system has the potential to benefit both buyers and sellers by simplifying the process of connecting and fulfilling orders. CTNs can regularly upload their tree stock onto the system, and tree buyers can upload their requirements. This system could be manual or automated. CTN cooperatives (Section 10.5) could strengthen the system by jointly listing tree stock, fostering collaboration and streamlining the buyer experience. 25% of CTNs (4/16) would consider using this system if it is limited to CTNs, and 19% (3/16) would use it alongside commercial nurseries. 56% (9/16) of CTNs surveyed would only sell trees locally, and 25% (4/16) do not have time to upload their requirements, therefore a TreeBay system is unlikely to attract large numbers of CTNs.

10.6.1 Option 6A: Manual sales system

A manual system would mean either a CTN can look through tree buyers' requirements and contact them to supply the trees (benefit of direct sales and relationship building while accessing a larger market), or vice versa with a tree buyer directly contacting CTNs who have the required stock available.

10.6.2 Option 6B: Automated sales system

For a more streamlined experience and less administration time for individual CTNs and tree buyers, the matching of buyers and sellers could be automated. This could take the form of an algorithm built into the system, or semi-manually with an administrator for the sales system taking on the coordination role. The administration support and webhosting/management costs could be funded by a small order fee, taken either from CTNs, tree buyers, or both.

10.7 Assessment of options

Each of the options was assessed using the data gathered during this project, against the effort needed to implement the option compared with the impact on CTNs the action will have. The results are shown in the chart in **Figure 2** and final scores (effort x impact) and ranks of the options are presented in **Table 10-1**.

Figure 2 Assessment of market options for CTN trees

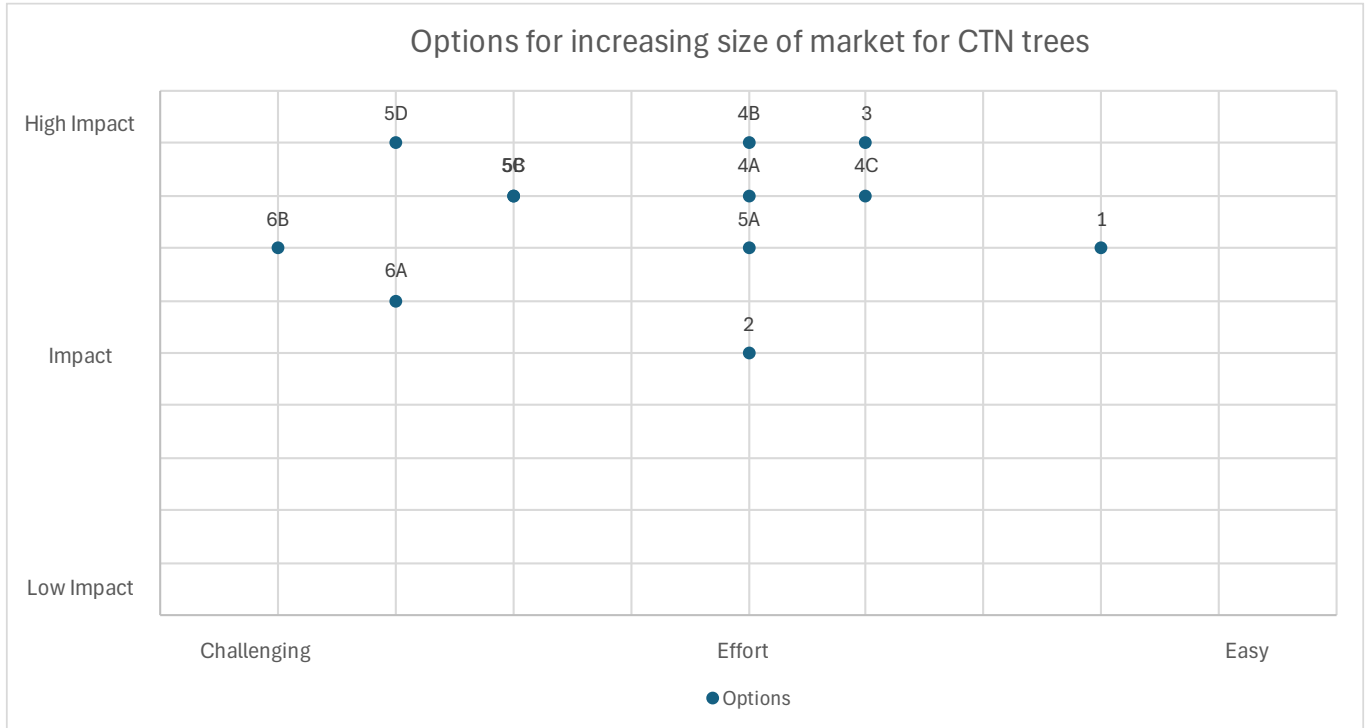


Table 10-1 Effort x impact scores for each option, arranged by highest to lowest total score

No.	Option	Effort (E) Score	Impact (I) Score	E x I Score	Comments
1	Increasing direct sales	8	7	56	Simple steps can support CTNs to increase sales
3	Selling tree seed	6	9	54	Strong interest amongst CTNs and wider benefits for the sector, fostering partnerships with commercial nurseries and improving CTN cashflow
4C	Flexible contracts	6	8	48	Requires relatively little change but increases chance of CTNs fulfilling forward orders
4B	Partial-fulfilment contracts	5	9	45	Opens up a potentially significant market for CTNs, with relatively modest increase in administration for tree buyers
4A	Contract growing: Direct contracts	5	8	40	Requires tree buyers to plan much further ahead (higher effort) but can give CTNs certainty of income (high impact)
5A	Local CTN cooperative, direct sales	5	7	35	Creates a support network for CTNs but large administration burden

2	Individual online sales	5	5	25	Most CTNs unwilling to offer shopping so online sales unlikely to increase market size beyond local market
5B	Local CTN cooperative, direct and online sales	3	8	24	Opens new market opportunities but a significant administration burden for CTNs
5C	National CTN cooperative, direct sales	3	8	24	Creates a support network for CTNs but large administration burden. Larger chance of issues with higher number of CTNs
5D	National CTN cooperative, direct and online sales	2	9	18	Opens new market opportunities but a significant administration burden for CTNs, and larger chance of issues with higher number of CTNs
6A	TreeBay: manual	2	6	12	Low interest from CTNs so reduced impact
6B	TreeBay: automated	1	7	7	Low interest from CTNs so reduced impact

11 Conclusion

Although the CTN sector is small, they play an important role in UK tree production, both in terms of local seed provenance, engagement with communities in growing and planting trees, and wider social and environmental benefits^{14, 15}. To support CTNs to expand the current market for their trees, various options have been assessed, in terms of effort required and impact created (Section 10). The most valuable options to pursue, in order of preference, are:

- 1: Individual direct sales (Section 10.1)

Direct sales remain the primary selling method for community tree nurseries (CTNs) - a centralised CTN hub could help expand local and national networks, raise awareness of CTNs, and strengthen market relationships. The hub could serve as an information and resource platform, providing tools like templates and training videos to support CTNs in growing their markets, and allowing tree buyers to learn about and find CTNs. The CTN hub is currently being pursued in a funding bid by the International Tree Foundation and has wide support from the CTN sector.

Encouraging uptake of the UK and Ireland Sourced and Grown (UKISG) through increased marketing to CTNs can enable CTNs to sell trees to the Woodland Trust, who are the largest e-NGO tree buyer. The scheme can also be promoted as evidence of biosecurity measures at CTNs, to overcome the biosecurity concerns of most tree buyers considering CTN trees⁷.

The free advice offered as part of UKISG can also help CTNs who wish to become Plant Healthy accredited, increasing direct sales by allowing CTNs to supply trees for government grant schemes. 43% of CTNs are interested in obtaining Plant Healthy and a further 40% would consider it¹, yet only two CTNs are currently certified¹⁶. Therefore, reducing barriers to entry will be valuable to the CTN sector.

- 3: Selling tree seed (Section 10.3)

The tree seed market offers a significant opportunity for CTNs, particularly in underserved seed zones, as seed provenance becomes increasingly valued by buyers. Some Welsh CTNs already sell seed and training resources on seed selling are available on the [CommuniTree website](#). Online training, videos and handbooks have been produced by the Growing Diversity project on seed collection, with a focus on underserved species and seed zones. An online webinar to highlight this market and the resources available would be of benefit to CTNs.

CTNs could benefit from streamlined regulations and support from the Forestry Commission to reduce barriers to small-scale seed collection. Selling seed, either surplus seed or seed harvesting to sell, could provide CTNs with an additional income stream and improve cash flow.

- 4 Contract Growing (Section 10.4): 4C: Flexible contracts and 4B: Partial fulfilment contracts

Contract growing offers mutual benefits for community tree nurseries (CTNs) and tree buyers by addressing challenges in sourcing specific tree stock and seed provenance. It provides CTNs with a predictable income and clearer planning and can help build local partnerships. Flexible contracts, accommodating species variations and overall tree numbers, can mitigate risks like low germination or growing losses. Partial-fulfilment contracts allow smaller nurseries to supply some trees as part of bigger orders. CTNs would have to be capable of responding to tender requirements set by tree buyers, which may include evidence of biosecurity procedures.

12 Recommendations

To pursue the four highest scoring options identified, the following recommendations are made:

CTN community and researchers

- The development, implementation and resourcing of a digital CTN hub to host resources relevant to CTNs, both to support CTNs and to help tree buyers learn about CTNs.

This will increase awareness of CTNs (and hence potential sales) and provide a central place for CTNs to access training and other resources such as market planning, to help build local markets. A CTN map can direct tree buyers towards their local CTN(s). This option is currently being pursued by the International Tree Foundation.

Woodland Trust

- Encourage uptake of UK and Ireland Sourced and Grown (UKISG) through increased marketing to CTNs.

Uptake of CTNs to the UKISG scheme has been high in 2023 and 2024, so continuing to engage with the CTN community can continue this trend. The UKISG offers good support to CTNs through the free site visits and advice and can help CTNs demonstrate good biosecurity procedures.

Tree buying organisations

- Offer flexible and partial-fulfilment contracts, with minimum and maximum number on species within an order and allow individual nurseries to fulfil part or a larger order.

This will enable more CTNs to access contracts by reducing the minimum number of trees they need to produce and will reduce the risks associated with low germination or growing losses. CTNs would have to be capable of responding to tender requirements set by tree buyers, which may include evidence of biosecurity procedures.

UK and devolved governments

- Commit to funding support and accessible grants for CTNs when current funding period ends (March 2025), based on evidence gathered by CTN-related research projects.
- Free or subsidised entry to Plant Healthy, with support of plant health experts to create scale-appropriate biosecurity protocols for CTNs, that meet existing biosecurity standards without excessive administrative burdens on CTNs.
- Extend the Biosecure Procurement Requirement exemption form to include evidence-based low risk tree suppliers such as CTNs producing trees for local tree planting schemes and allow membership of the UKISG scheme as evidence of sufficient biosecurity measures in the “sourcing summary”.
- The coordination of tree nursery regulations and standards to avoid the duplication of effort for tree nurseries, and or more accessible guidance and coordinated advice. To include Forest Reproductive Material (FRM) Regulations, plant passporting, Plant Healthy and Ready to Plant.
- The streamlining of FRM requirements for seed testing to reflect small-scale seed collection and non-commercial forestry seed. Support for CTNs to engage with the system to enable them to sell seed.

13 Roadmap for chosen options

13.1 Support for direct sales

Timeframe	Overview of action	Goal	Led by
Short term 0 - 12 months	<p>1) <u>Launch funding bid for a CTN hub</u></p> <p>Create a funding bid to collate and expand existing resources for CTNs.</p> <ul style="list-style-type: none"> Funding bid to be developed and reviewed by existing national group of CTN stakeholders, chaired by Defra with representatives from the Tree Council, Woodland Trust, Coventry University, Fellowship of the Trees, International Tree Foundation and Norfolk County Council 	High quality funding bid submitted for CTN hub	Stakeholders from CTN community, including Fellowship of the Trees CTNC and the International Tree Foundation. Defra can provide strategic guidance.
	<p>2) <u>Promote UK and Ireland Sourced and Grown (UKISG) Assurance Scheme</u></p> <p>Actively encourage CTNs to join the UKISG assurance scheme by demonstrating the benefits of free advice, biosecurity assurance, and improved buyer confidence.</p>	Make it easier for CTNs to access support and demonstrate good working practice to tree buyers.	Woodland Trust.
	<p>3) <u>Commit to funding support and accessible grants for CTNs when current funding period ends (March 25)</u></p> <p>Use evidence gathered around the benefits of CTNs and the needs of CTNs and use to develop a CTN-accessible grant scheme. Grant-scheme to include:</p> <ul style="list-style-type: none"> Dedicated long-term funding for CTNs to develop and deliver sustainable nursery management plans including the development of local partnerships. Capital and revenue grants to implement the sustainable nursery management plan. Long funding periods to allow CTNs to easily apply for funds. 	Make it easier for CTNs to access support and grants.	Defra and Forestry Commission.

Timeframe	Overview of action	Goal	Led by
<p>Medium term 12 - 24 months</p>	<p>4) <u>Launch and promote the CTN Hub</u></p> <p>Establish a centralised digital hub for CTNs.</p> <ul style="list-style-type: none"> • Gather key insights and resources from recent CTN-focused projects, including Growing Diversity, Growing Connections, CommuniTree, and the Boosting Community Tree Nursery pilot • To include direct marketing resources and training, and wider training such as biosecurity that will help overcome concerns of tree buyers by enabling CTNs to follow best practice. • Provide a repository for resources, training materials, and guides. • Include a map and directory of CTNs who wish to sell trees with contact details. • Can help CTNs to collaborate, for example larger CTNs supporting their smaller local CTNs in generating sales and establishing local networks and cooperatives. • Actively promote the CTN hub to CTNs and tree buyers through newsletters, webinars, and events. 	<p>Create a platform for CTNs to network and share experiences and help tree buyers learn about CTNs.</p>	<p>Stakeholders from CTN community, including Fellowship of the Trees CTNC and the International Tree Foundation. Defra can provide strategic guidance.</p>
<p>Long term / Ongoing 24 months +</p>	<p>5) <u>Evaluate and improve the CTN hub</u></p> <p>Collect feedback and identify and overcome knowledge gaps:</p> <ul style="list-style-type: none"> • Monitor the effectiveness of the CTN hub and the dissemination of resources. • Collect feedback from CTNs and tree buyers to refine the hub and information-sharing processes. • Identify any information gaps and create new research projects to address these. 	<p>Ensure continued relevance and support for CTNs in overcoming market barriers and sustaining growth.</p>	<p>Stakeholders from CTN community, including Fellowship of the Trees CTNC and the International Tree Foundation.</p>

13.2 Support to sell tree seed

Timeframe	Overview of action	Goal	Led by
Short term 0 - 12 months	<p>1) <u>Share and review existing resources</u></p> <p>Assess existing resources on selling tree seed for suitability for English CTNs.</p> <ul style="list-style-type: none"> Assess tree seed selling documents produced by Llais y Goedwig as part of their CommuniTree project. Integrate existing tree seed collection resources (Tree Growers Guide and new resources developed as part of Growing Diversity project) into guide that includes selling the gathered seed. 	Ensure CTNs have the information they require to consider tree seed sales.	Fellowship of the Trees CTNC with support from CTN-related projects (mostly funded until end of March 2025).
Medium term 12 - 24 months	<p>2) <u>Engage with the Forestry Commission</u></p> <p>Work with the Forestry Commission to make selling tree seed easier for small-scale seed collectors such as CTNs:</p> <ul style="list-style-type: none"> Clarifications on testing requirements for small quantities of seed (as defined by the Forest Reproductive Material (FRM) Regulations, varies per species). Work to simplify the system of notification of seed collection and seed testing. 	Make selling tree seed more accessible to CTNs.	Fellowship of the Trees CTNC, Woodland Trust (policy and advocacy) and Forestry Commission.
Long term / Ongoing 24 months +	<p>3) <u>Promote local seed from CTNs</u></p> <p>Promote CTN tree seed by developing markets and partnerships.</p> <ul style="list-style-type: none"> Build partnerships with tree seed buyers such as commercial nurseries. Consider CTN cooperatives/networks to work together to sell larger quantities of seed. 	Increase the success of CTNs selling tree seed.	Fellowship of the Trees CTNC, with technical support from the Woodland Trust.

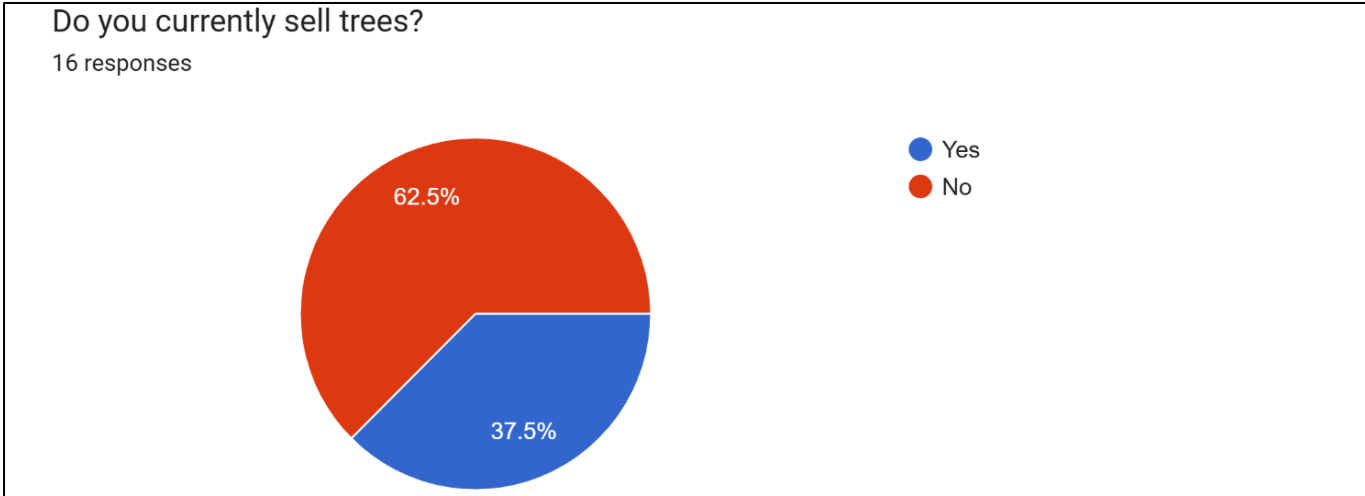
13.3 Flexible and part-fulfilment contracts

Timeframe	Overview of action	Goal	Led by
Short term 0 - 12 months	<p>4) <u>Identify tree buying organisation(s) and CTNs to take part in a trial</u></p> <p>The trial(s) will include flexible and/or part-fulfilment contracts as defined below:</p> <ul style="list-style-type: none"> Flexible: Offer minimum and maximum quantities of each species required, with a total overall number of trees. Part-fulfilment: Allow nurseries to fulfil smaller parts of larger contracts, for example breaking larger orders into 10% blocks which a single nursery can only apply for up to 3 or 4, or splitting an order into a 10%, 20% and 70% block. 	To setup a trial of contracts that are better suited to CTNs.	Fellowship of the Trees CTNC (finding CTNs for trial). Tree Buyer (TBC)
Medium term 12 - 36 months	<p>5) <u>Tree buyer trial of flexible and part-fulfilment contracts</u></p> <p>Trial flexible and part-fulfilment contracts, as defined in point 4 above.</p>	Make it easy for CTNs to provide trees as part of procurement.	Tree buyer organisation, working with CTNs in the trial.
Long term / Ongoing 36 months +	<p>6) <u>Evaluation of trial and sharing of experiences.</u></p> <p>Evaluate trial and publish advice for other organisations on how to offer flexible and part-fulfilment contracts, and the benefits of engaging with CTNs.</p> <ul style="list-style-type: none"> Survey and or interview with tree buyers and CTNs who took part in the trial to evaluate the success. Adapt and refine the procurement process to enable more CTNs to take part. Share experiences to enable other tree buyers to learn from the trial. 	Continue to adapt the trial and encourage other tree buyers to consider CTN-accessible contracts.	Tree buyer organisation, working with CTNs in the trial and wider CTN community such as Fellowship of the Trees CTNC to promote the outputs.

14 References

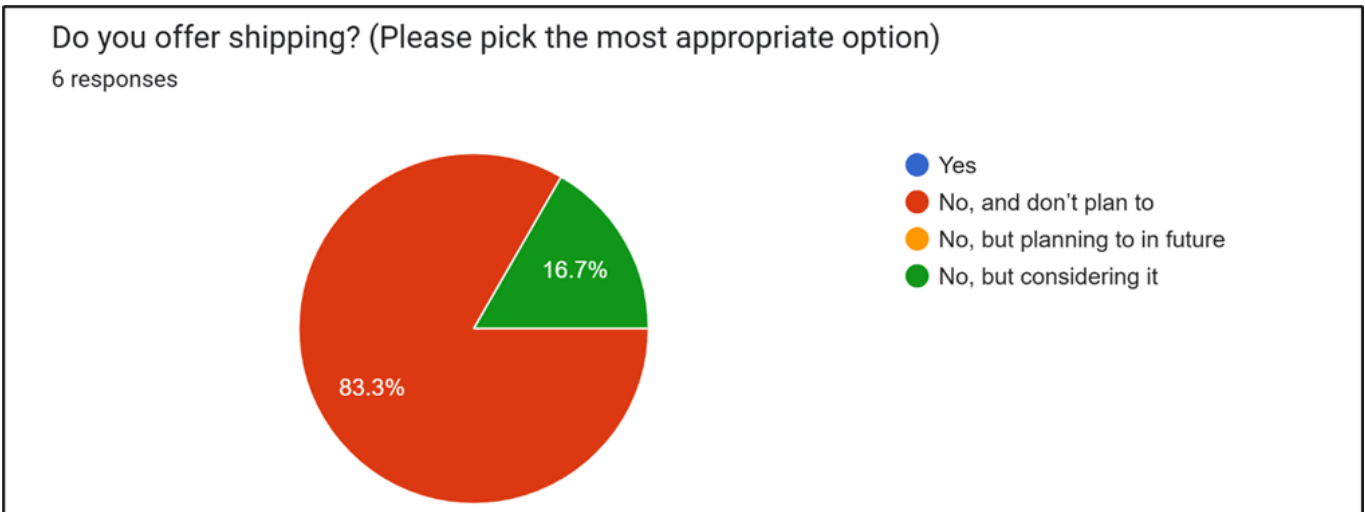
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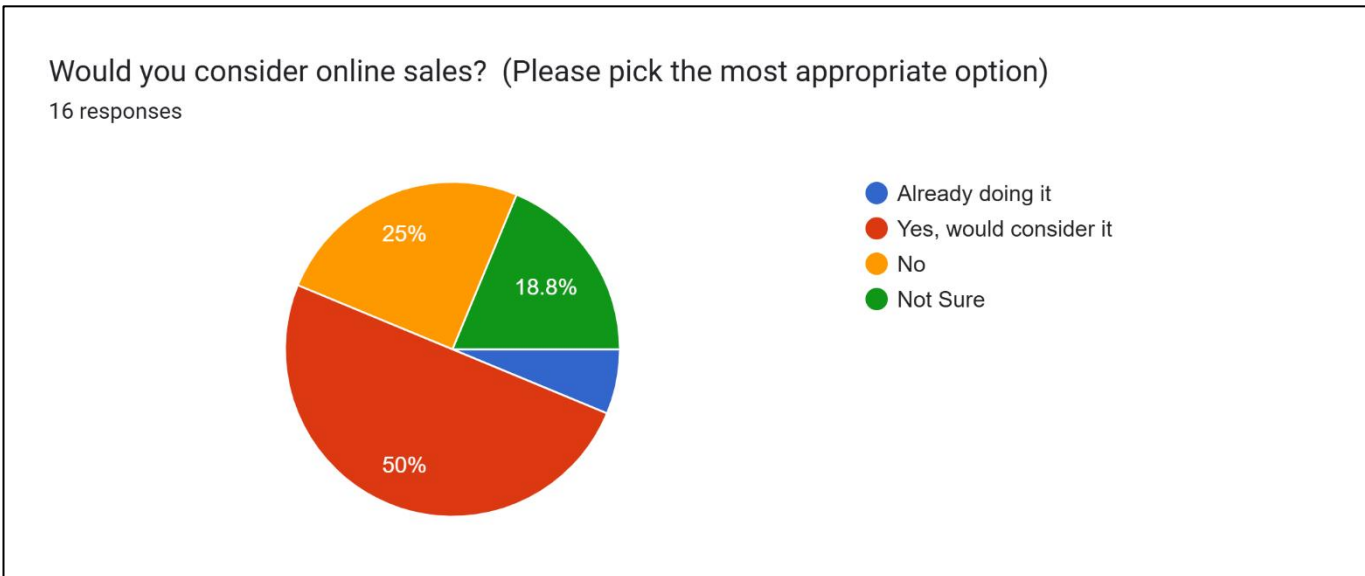
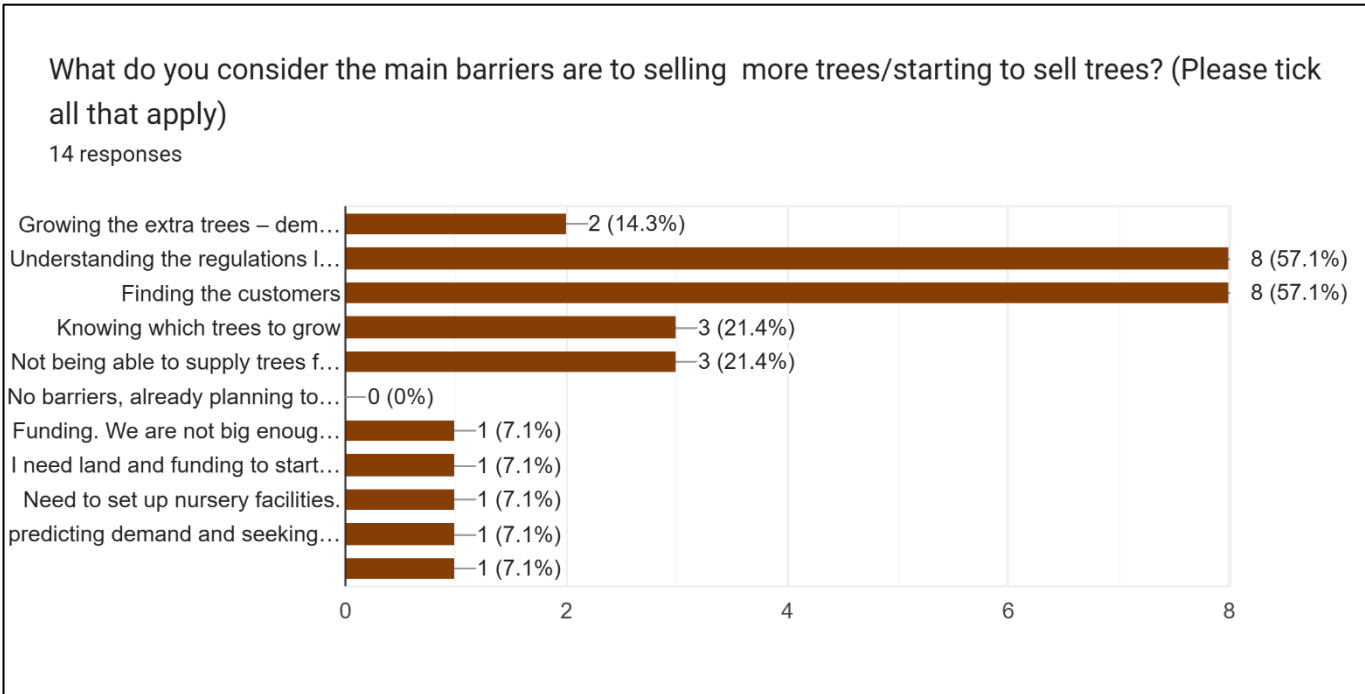
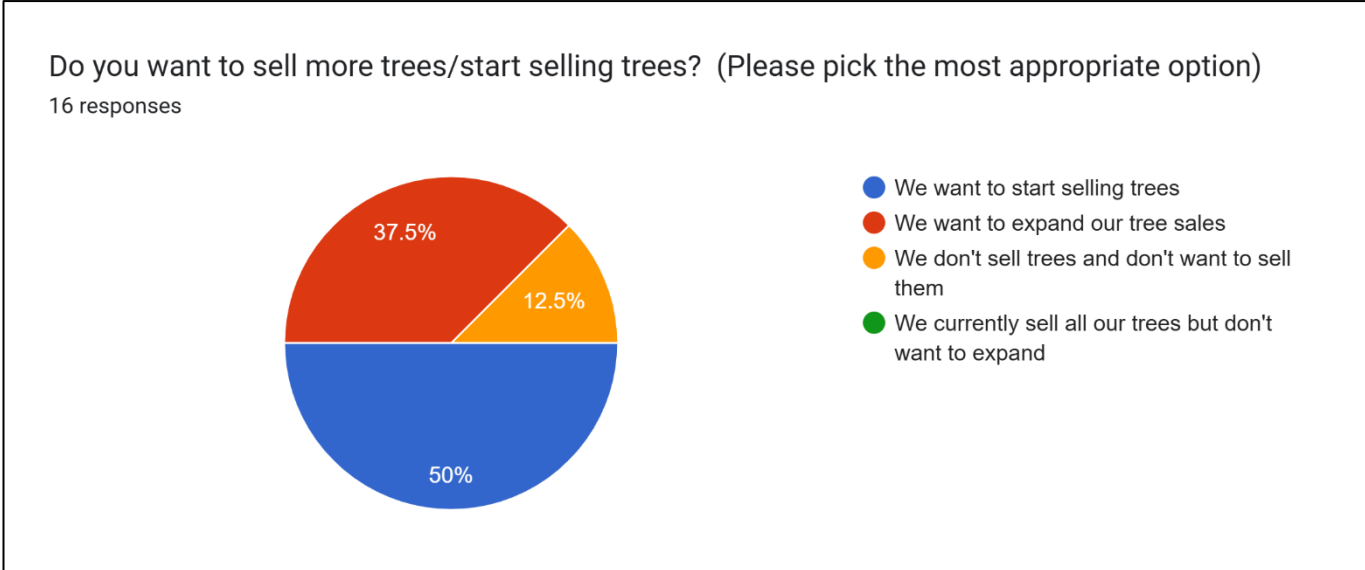
Appendix A – CTN Survey Results

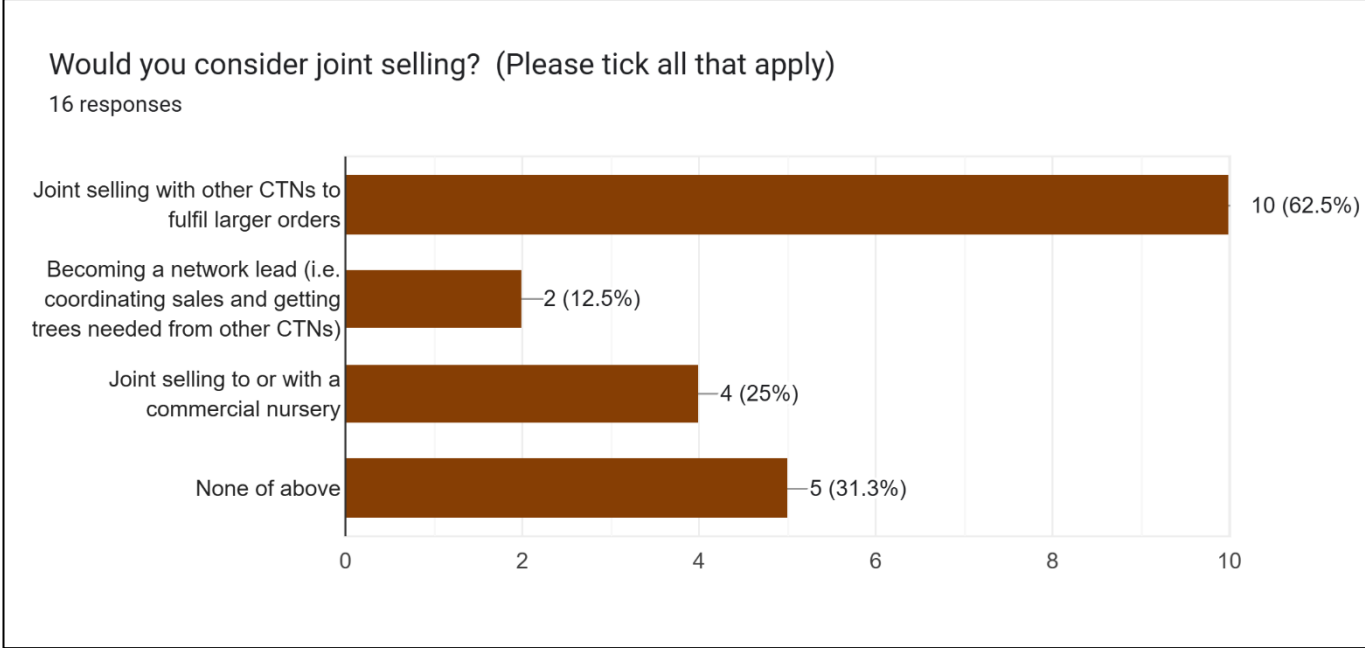


How and where do you currently sell your trees?
6 responses

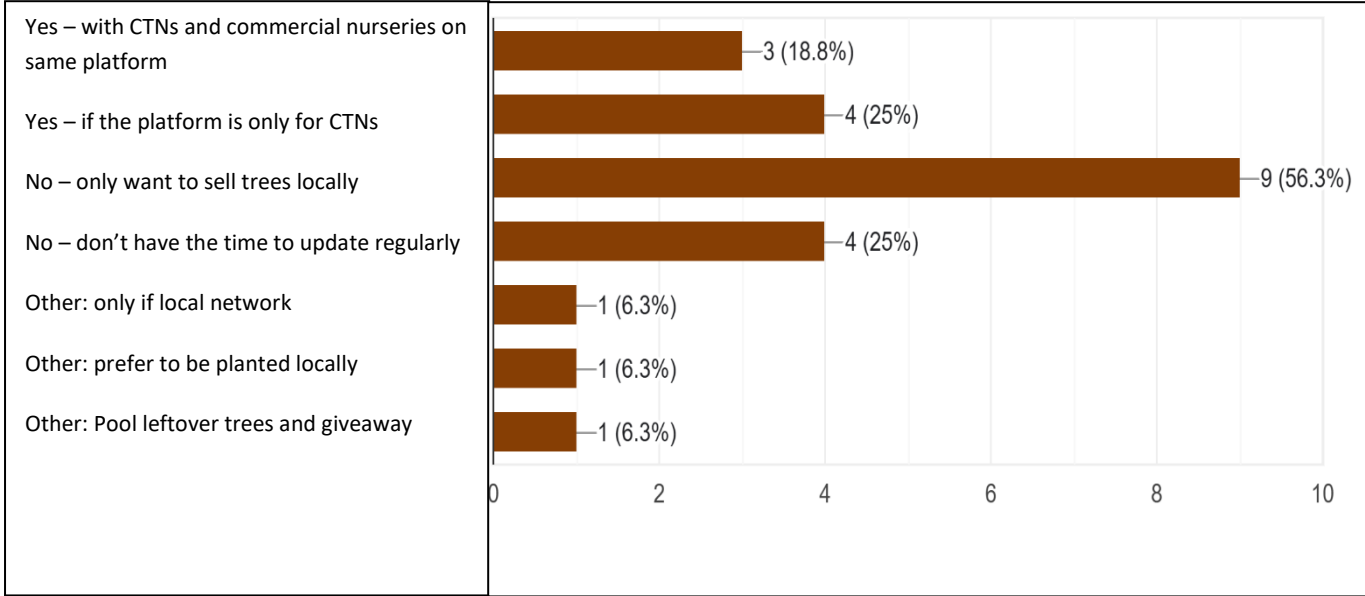
- Have sold to the Norfolk Oliver Tree company, as they want to trial bonsai trees. Currently offering oaks through the NCC subsidised tree scheme.
- Face to face meetings with local people, at our Forest Centre in our sapling cart, through internal charges on projects we are leading ourselves
- From our site
- Direct from our onsite woodland nursery
- Locally on our website and social media and we use the trees in our own planting schemes to technically we sell them to the funder or the landowner if they are the funding recipients.
- Direct from our tree nursery either into tree planting schemes we are supporting or direct to customers

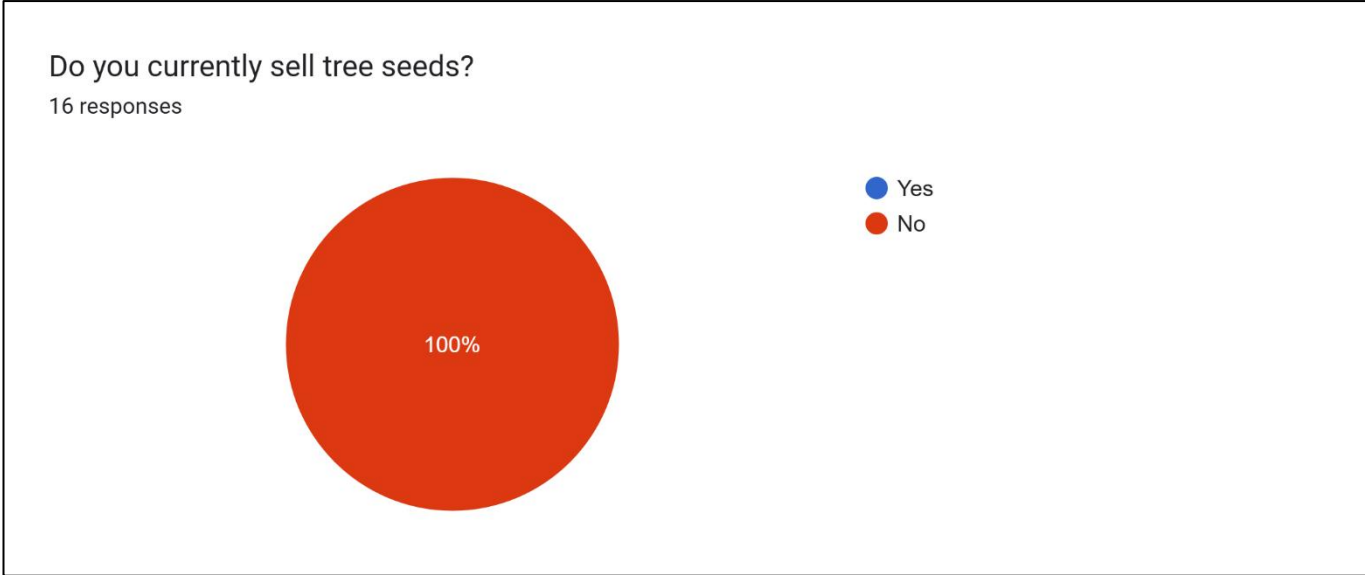






Would you be willing to upload your tree stock list to a system that matched tree buyers and sellers? (Please tick all that apply)
16 responses



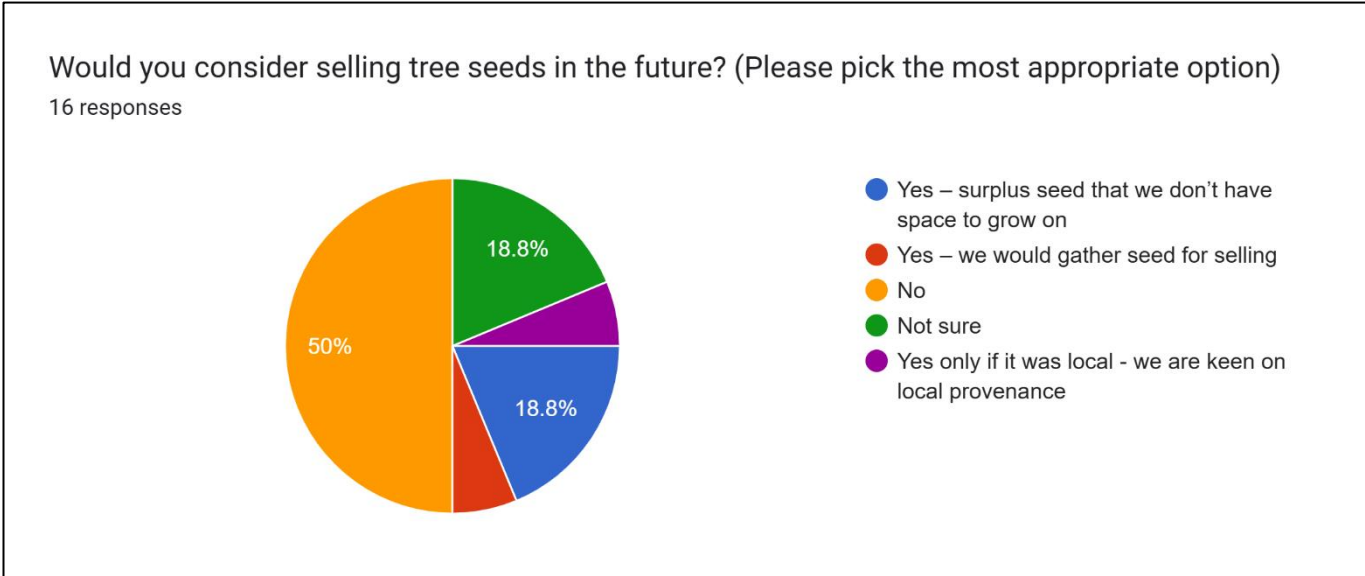


If yes, where do you currently sell your tree seed?

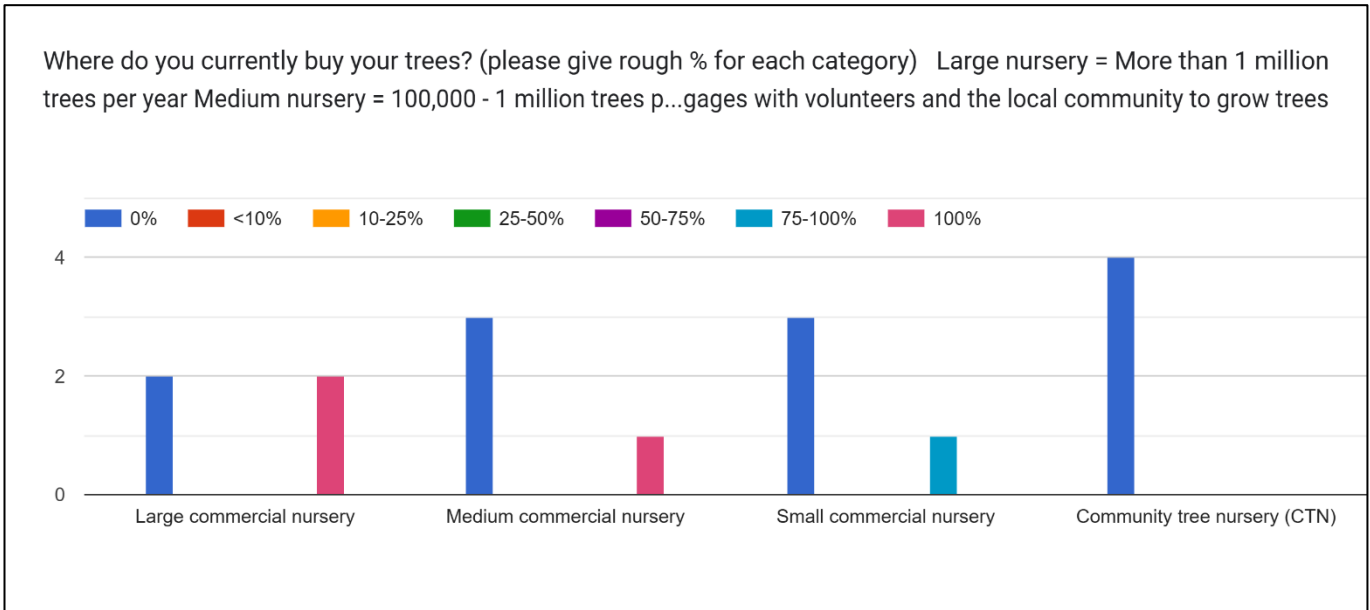
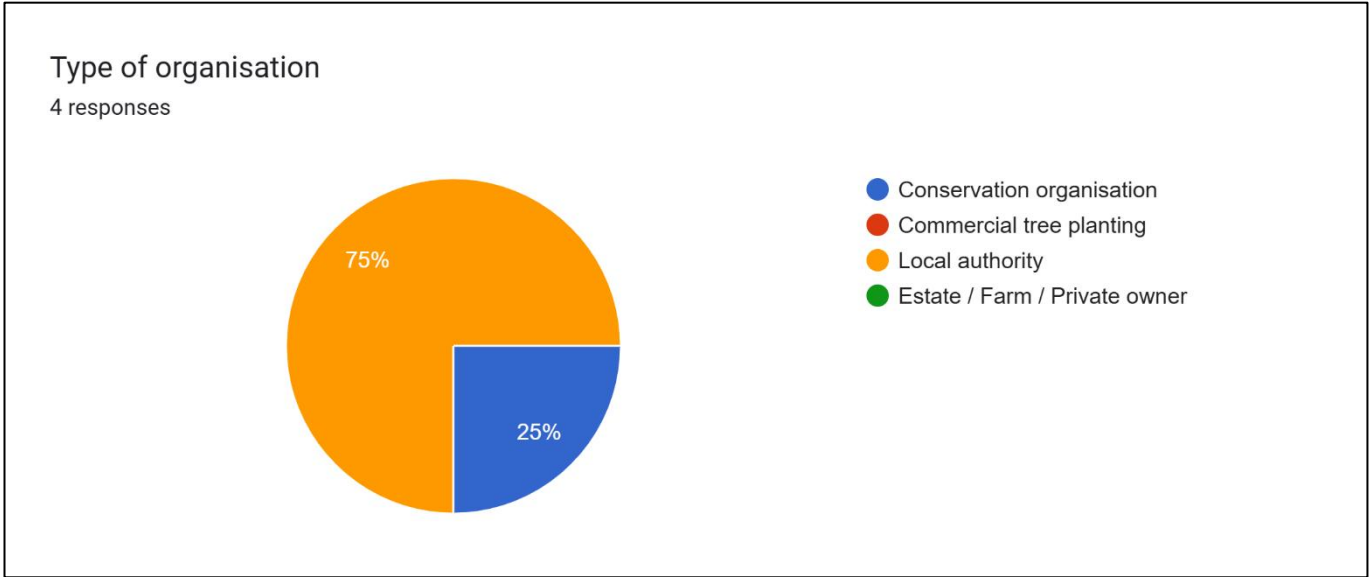
2 responses

We do not sell in Suffolk Tree Warden network. All our trees are given for local planting but we are often recipients of donations to the Network - helps us recover running costs of compost & pots. We work closely with WT and our volunteers distribute the WT tree packs

We share with Suffolk Tree Wardens or, happy to share with other CTN's or excess seed could be sold...

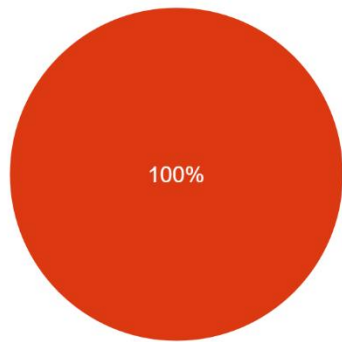


Appendix B – Tree Buyers Survey Results



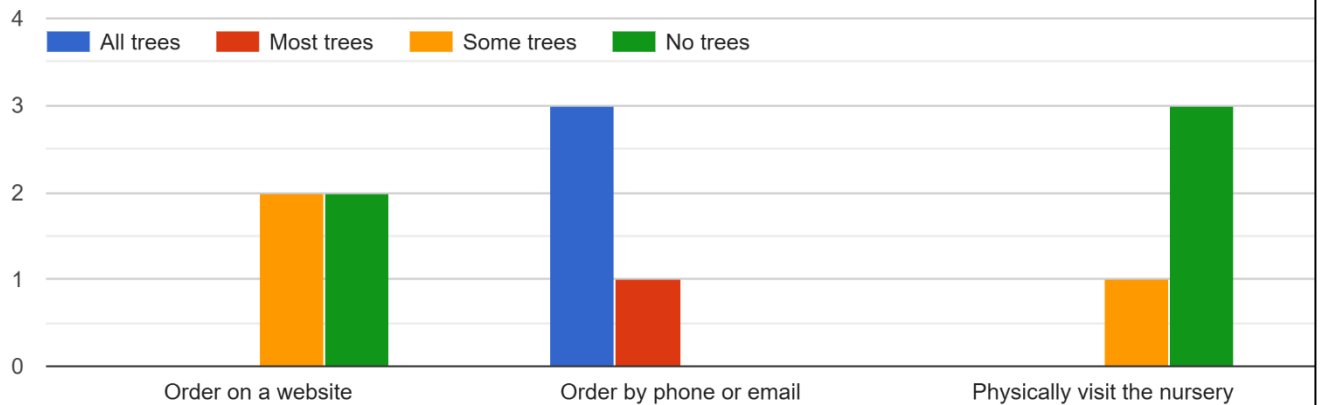
Do you always use the same suppliers or do you consider/pursue new suppliers?

4 responses



- We always use the same supplier(s)
- We tend to use the same suppliers, but are open to new suppliers
- We actively pursue new suppliers

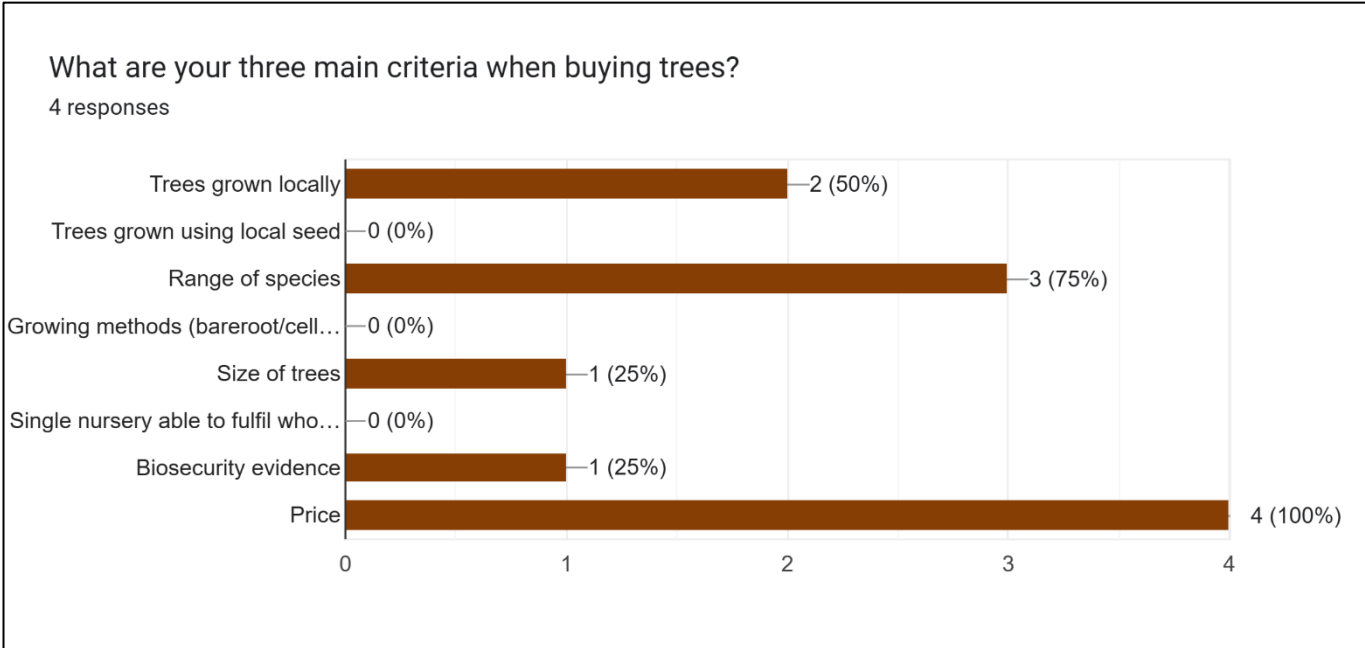
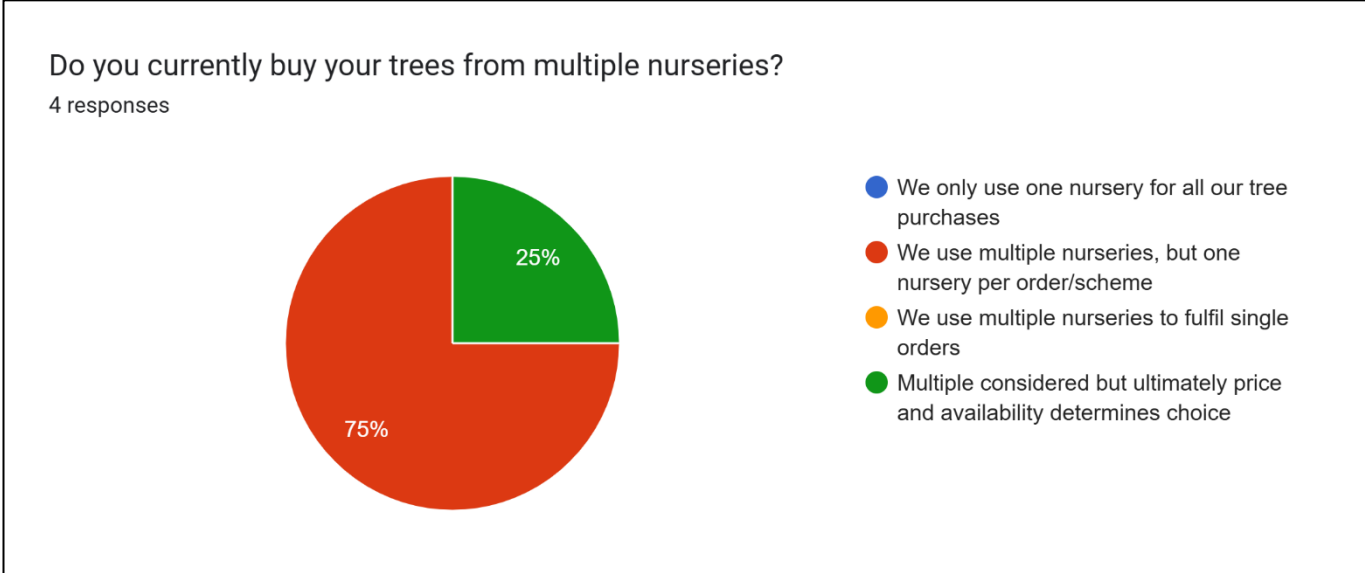
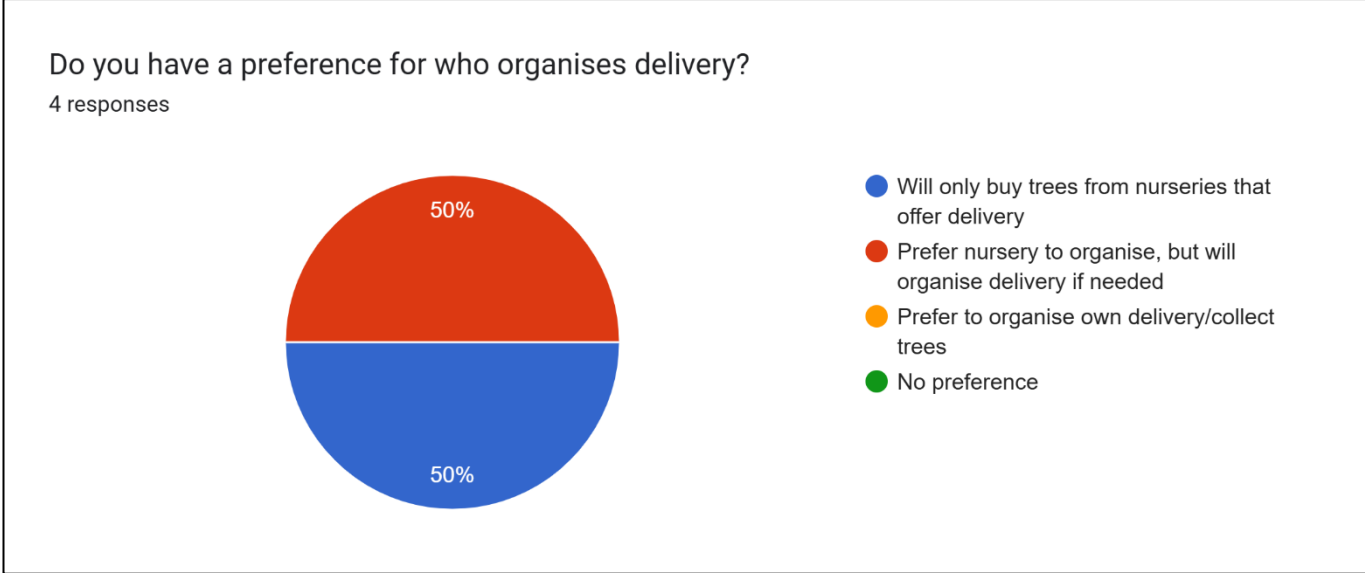
How do you buy trees?

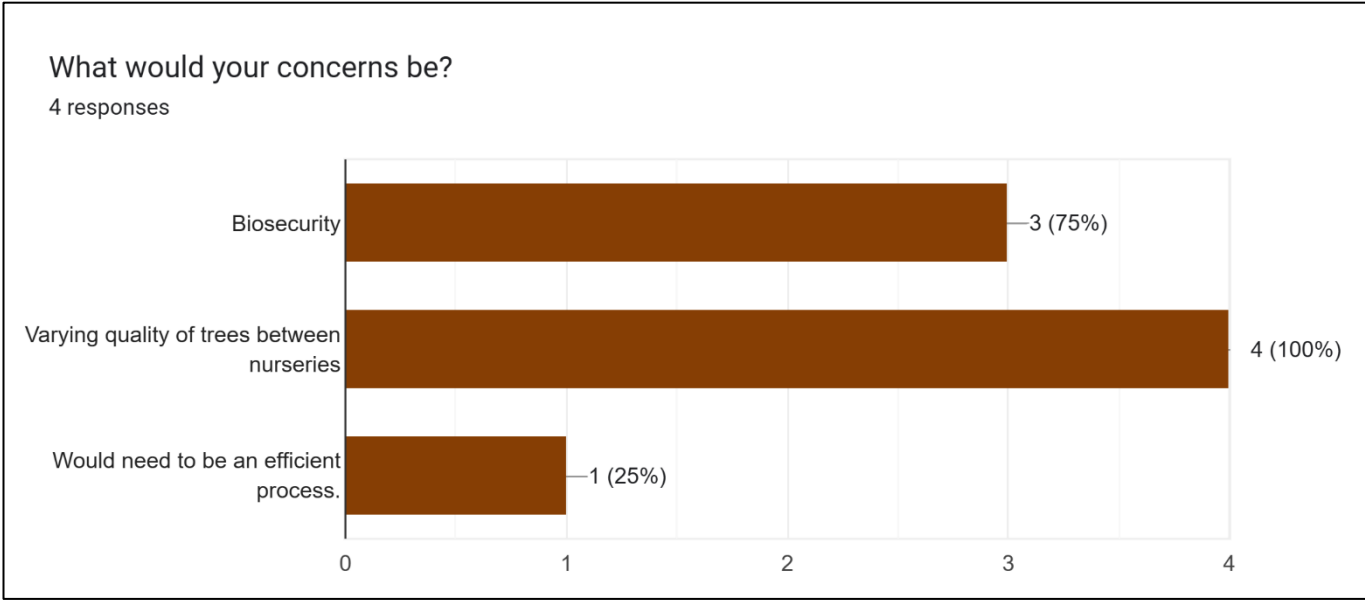
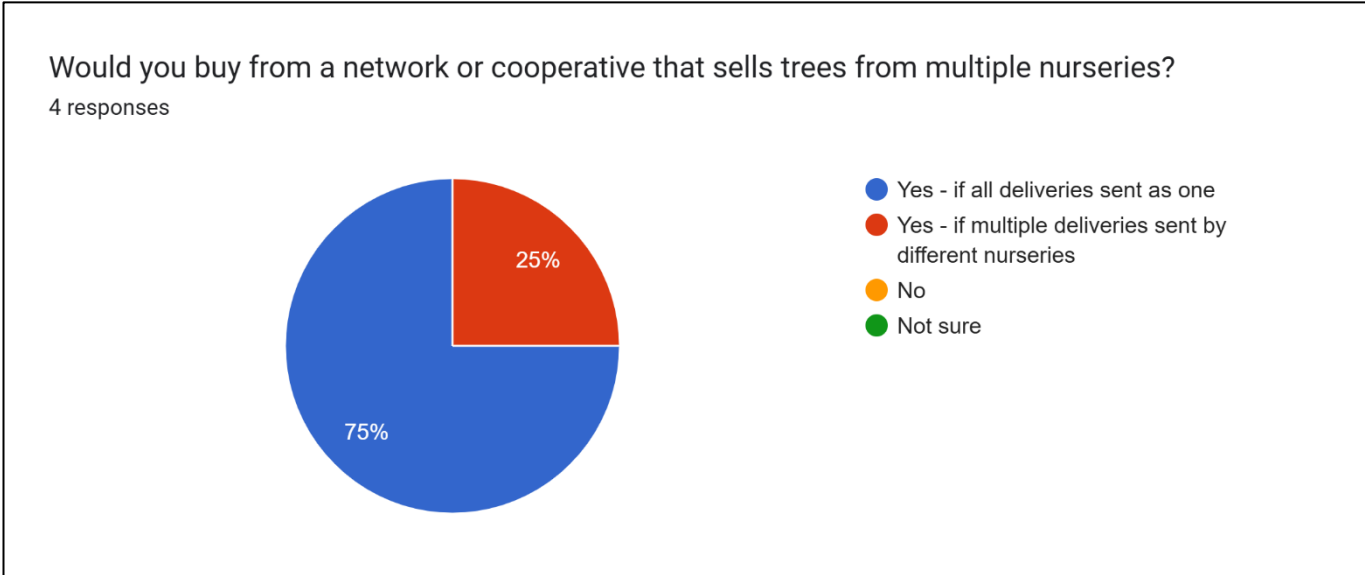
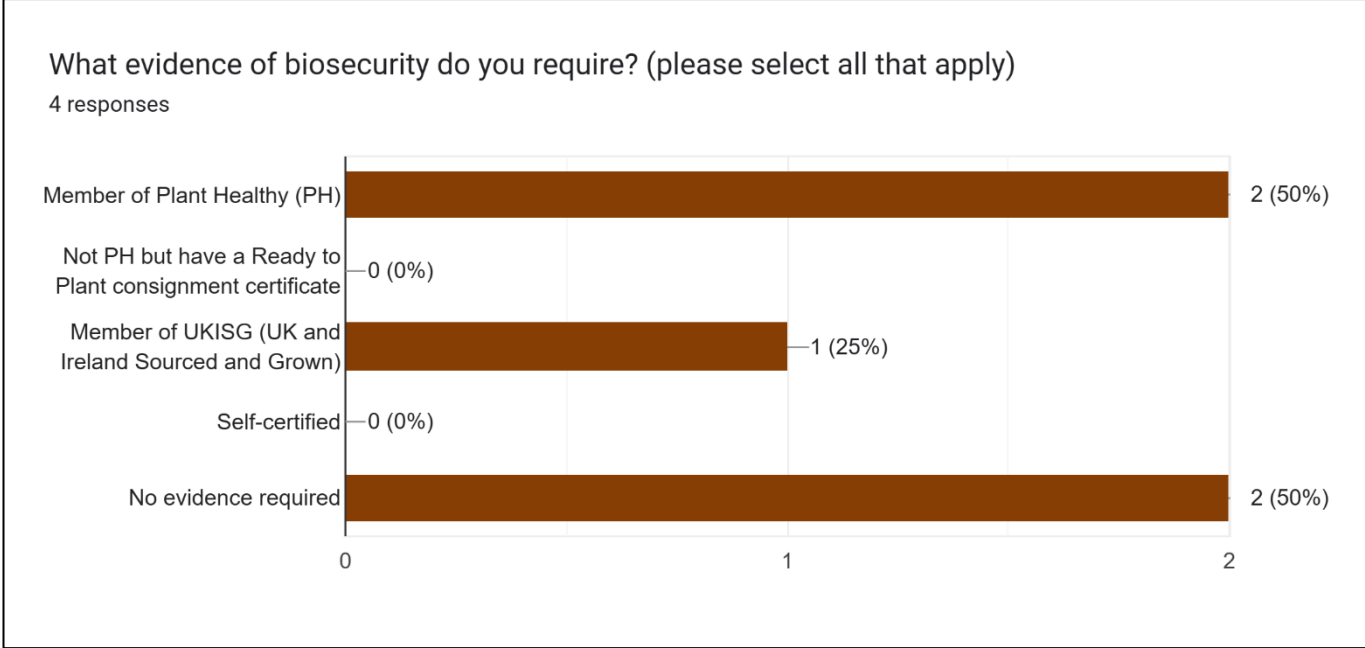


Are there any trees you find hard to source? Please give details.

4 responses

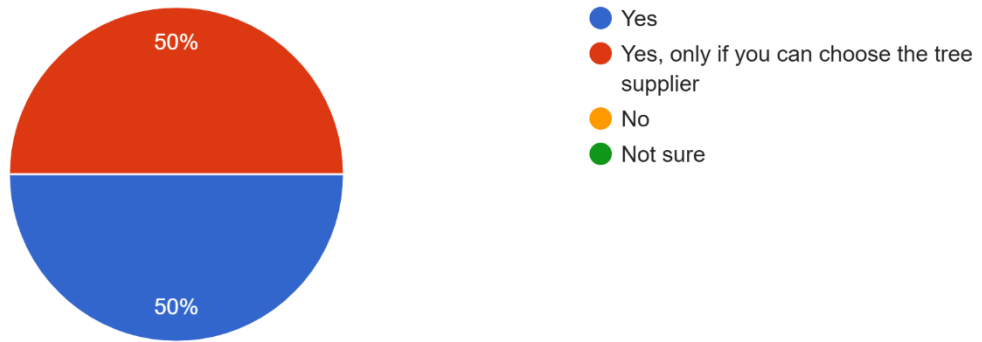
- N/a - we tend to order a hardy mix of common native species suitable for urban gardens
- No
- Species purchased is always based on availability
- disease resistant elm and small leaved lime





Would you be willing to upload your requirements to a system that matched tree buyers and sellers?

4 responses

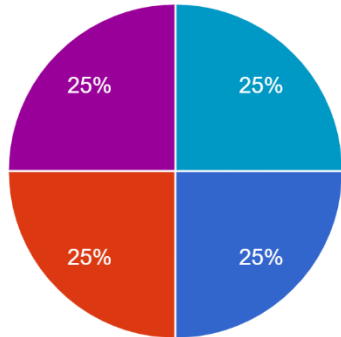


How far ahead do you buy your trees?



Would you consider buying trees on advance contract (2-3 years ahead to allow nursery to grow them from seed)

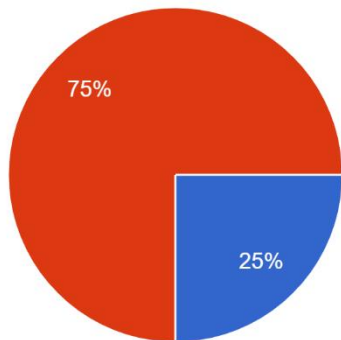
4 responses



- Yes - for any trees
- Yes - for local provenance trees
- Yes - for hard to find species
- No
- Not sure
- Dependent on project need

When did you become aware of CTNs?

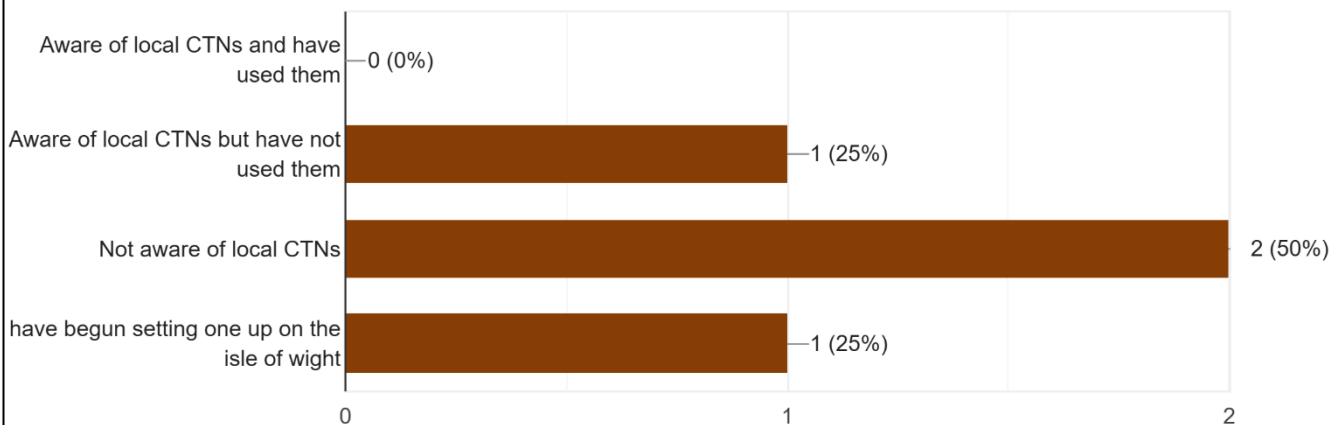
4 responses



- Several years ago
- Around a year ago
- Within last few months
- During this survey

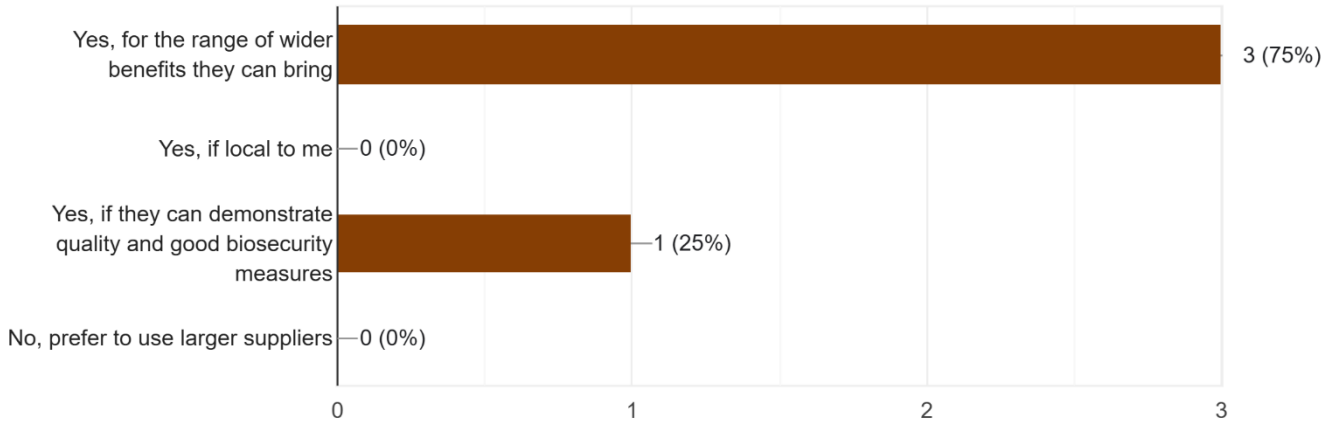
Do you know where your local CTN(s) are, and have you used them?

4 responses



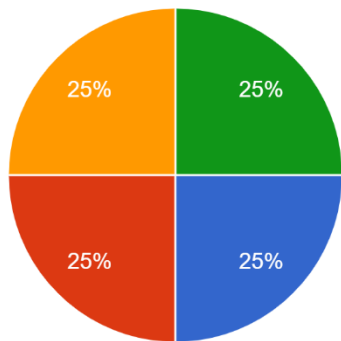
Would you consider buying from CTNs in the future?

4 responses



Would you pay a premium for trees where clear secondary benefits exist at the nursery? (e.g. social benefits, mental health benefits)

4 responses



- Yes
- Yes - only if the other factors are met
- No
- yes, but the price would have to be right as we are a charity and cant over pay