

Status quo of the European forest tree nursery sector

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Anonymous mode

The anonymous option has been activated. As a result, your contribution to this survey will be anonymous as the system will not save any personal data such as your IP address.

1 Instructions

What is the purpose of this survey?

Faced with the challenges posed by climate change, new European policies call for new forest management strategies to increase European forest resilience. They aim to intensify efforts to restore forest ecosystems through massive tree plantations by 2030, in full respect of ecological principles. We can only achieve this with a well-developed nursery sector supporting plantation and restoration efforts. However, we can only support you if we understand the nursery sector better.

This survey is for **owners or managers of forest tree nurseries**. We require one contribution per nursery.

Your answers help us understand your current work circumstances. Furthermore, it is your chance to tell us about the main obstacles in producing Forest Reproductive Material (FRM) and about the support your business needs to increase effective production.

In this questionnaire, we ask about your nurseries' production and capacity, the origin of seeds you use, the impact of market conditions and legal regulations on your operations.

The survey will take about 15-20 minutes to complete. Your responses remain confidential and anonymous.

We often ask for annual averages or numbers. Your answers don't have to be precise; we are only interested in rough averages.

We very much appreciate your help.

For more information about the project

Go to: <https://www.optforests.eu/>

Privacy notice

This privacy notice tells you about the information we collect from you when you agree to participate in this survey. The survey on *Status quo of the European forest tree nursery sector* aims at owners or managers of officially registered forest tree nurseries in European countries. The results of this study

will enable us to understand the main challenges in the sector as a whole and help develop a European support system to strengthen the industry and ensure its future thrive.

This survey is developed as part of the Horizon Europe Project OPTFORESTS, funded by the European Union to enhance diversity and resilience of future European forests.

In collecting this information, we are acting as a data controller and, by law, we are required to provide you with information about us, about why and how we use your data, and about the rights you have over your data.

Who are we?

We are the *Bundesforschungs- und Ausbildungszentrum für Wald, Naturgefahren und Landschaft - Austrian Research Centre for Forests* (BFW). Our address is: Seckendorff-Gudent-Weg 8, 1130 Vienna, Austria. You can contact us by post at the above address or by e-mail at heino.konrad@bfw.gv.at. Our organisation is part of an international team containing 19 other European organisations working altogether on the OPTFORESTS project.

What personal data do we collect?

You can participate in the survey without giving your details, but if you are interested in learning more about the survey's outcome or are willing to participate in a follow-up business tendency survey, we ask for the following information: Name, Organisation, City/Town, Country and Email Address.

If you supply your personal data we will only use it to send you information regarding the results of the survey, a more in-depth explanation of the OPTFORESTS project and the related follow-up business tendency survey.

What do we do with your information?

The survey is hosted and collected through EUSurvey. The system uses session 'cookies' to ensure reliable communication between the client and the server.

Therefore, your browser must be configured to accept 'cookies', which disappear once the session has been terminated.

The system uses local storage to save copies of your input to the survey. This is to ensure there is a backup if the server is not available during submission or your computer is switched off accidentally, etc.

The local storage contains the IDs of the questions and the draft answers.

Once you have submitted your answers to the server or have saved a draft on the server, the data is removed from the local storage.

There is a checkbox above the survey - 'Save a backup on your local computer (disable if you are using a public/shared computer)' - to disable this feature. In that case, no data will be stored on the used computer.

What information is stored by EUSurvey when participants submit a contribution?

We created an anonymous survey, which means that EUSurvey will not save any personal data such as IP addresses.

Your rights over your information

By law, you can ask us what information we hold about you, and you can ask us to correct it if it is inaccurate. You can also ask for it to be erased or ask us to stop using your information. The simplest way to do this is to withdraw your consent, which you can do at any time, either by emailing or writing using the contact details above.

Your rights to complain

If you have a complaint about our use of your information, you can contact the Austrian Data Protection Authority at <https://www.data-protection-authority.gv.at/>.

2 Demographic Data

Age

Gender

- ☐ Female
- ☐ Male
- ☐ Diverse
- ☐ I don't want to disclose

Role at the nursery

Check all that apply.

- ☐ Owner
- ☐ Manager
- ☐ Other, please specify:

Other, please specify:

3 General Information

What is the ownership structure of your nursery?

- State
- ☐ Other public ownership
- ☐ Private ownership
- ☐ Shareholder company
- ☐ Department of a Forest Enterprise

Where is your nursery located? (Country, State)

Year of registration as a professional operator?

How many employees are currently working at your nursery?

	type of employment mode	number of employees
1	full-time	
2	part-time	
3	seasonal	
4	Total	<input type="text"/>

4 Nursery Production and Capacity

What is your current annual maximum production capacity for container tree seedlings, estimated in total units (number of plants)?

If you don't produce container tree seedlings, type 0.

What is your current annual maximum production capacity for bareroot tree seedlings, estimated in total units (number of plants)?

If you don't produce bareroot tree seedlings, type 0.

How many container tree seedlings are you producing annually, on average, estimated in total units (number of plants)?

If you don't produce container tree seedlings, type 0.

How many bareroot tree seedlings are you producing annually, on average, estimated in total units (number of plants)?

If you don't produce bareroot tree seedlings, type 0.

How many container tree seedlings are you selling annually, on average, estimated in total units (number of plants)?

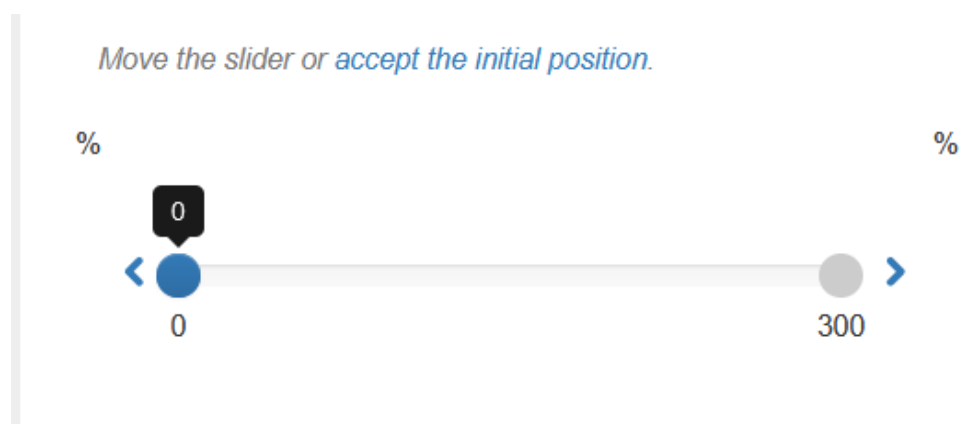
If you don't produce container tree seedlings, type 0.

How many bareroot tree seedlings are you selling annually, on average, estimated in total units (number of plants)?

If you don't produce bareroot tree seedlings, type 0.

How much could you expand your annual seedling production capacity in the next five years?

Please estimate the expansion possibility beyond your current maximum production capacity in percent (%).



What are the three main limiting factors for your nursery to increase production?

at most 3 choice(s)

- ☐ Technical/technological (e.g. seed availability, seed quality, availability of production area, soil fertility,...)
- ☐ Economic/financial (e.g. high competition with other producers, high labour costs, lack of loans, insufficient fundings,...)
- ☐ Political/legal (e.g. too strict regulations, national differences in import regulations...)
- ☐ Enviromental (e.g. early or late frost, increasing drought incidence, risk of fires,...)
- ☐ Social (e.g. lack of qualified workers, conflicts with enviromental associations,...)
- ☐ Other, please specify:
- ☐ There are no limiting factors to increasing production

5 Origin of Seeds

From which source do you acquire seeds each year, on average, over the last five years?

Please provide an estimate in percent (%) of total annual amount

- | Seeds from... | % of total annual amount |
|---|--------------------------|
| 1 your own harvest in a private forest | |
| 2 your own harvest in a national / public forest | |
| 3 a donation from a public agency | |
| 4 purchase from a public agency | |
| 5 purchase from national seed traders | |
| 6 purchase from international seed traders | |

Other, please specify:

7

Question 100%

8 Total

How often did you face the following challenges regarding the quality and quantity of the **seeds you bought** in the last five years?

	never	rarely	sometimes	often	always
Overall lack of seed to meet the demand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of seeds from preferred species	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of provenance or origin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Available material is too expensive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Origin of available material might be dubious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seeds are only available at irregular times	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seed is not clean, is damaged, affected by pests or diseases	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Too low germination rate/seedlings grow slowly or die	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other, please specify:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How often did you face the following challenges regarding the quality and quantity of **seeds from your own harvests** in the last five years?

	never	rarely	sometimes	often	always
Overall lack of seed to meet the demand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of seeds from preferred species	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of seeds from preferred provenances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Years of intensive fruiting are getting more irregular	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Too low germination rate/seedlings grow slowly or die	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other, please specify:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you engage in any form of outsourcing for seed pre-treatment, including buying any pre-treated seeds from seed providers?

Check all that apply.

- ☐ Yes, I do send some or all of my seeds away for pre-treatment
- ☐ Yes, I do buy some or all of my seeds pre-treated from seed providers
- ☐ No, I don't engage in any form of outsourcing for seed pre-treatment

In which countries do you engage in contract production with specialist nurseries to outsource the initial stages of seedling production, at least to some extent?

Check all that apply.

- ☐ In my home country
- ☐ Within the EU
- ☐ Outside the EU in other European countries
- ☐ I don't engage in any form of outsourcing for the initial stages of seedling production

6 Market Situation and Demand

Which are the **five best-selling species** in your nursery, and how has their demand changed in the last five years, in your opinion?

Please provide the scientific name, while '1' is the most demanded species.

	Scientific species name	demand change in the last five years
1	<input type="text"/>	increased ▼
2	<input type="text"/>	stagnated ▼
3	<input type="text"/>	decreased ▼
4	<input type="text"/>	▼
5	<input type="text"/>	▼

In the next ten years, which **five species** will be the most important in demand in your country? And how will their demand change, in your opinion?

Please provide the scientific name, while '1' will be the most demanded species.

Scientific species name demand change in the next ten years

	Scientific species name	demand change in the last five years
1	<input type="text"/>	increased ▼
2	<input type="text"/>	stagnated ▼
3	<input type="text"/>	decreased ▼
4	<input type="text"/>	▼
5	<input type="text"/>	▼

Please rank the **three most important areas** your nursery would need to invest in as a reaction to changing demand in the next five years.

Please note that only rank 1 to 3 will fall into account, while rank '1' represents the most important area.

Use drag&drop or the up/down buttons to change the order or [accept the initial order](#).

⋮
↑ ↓
Market and Promotion

⋮
↑ ↓
Increase of production of Forest Reproductive Material

⋮
↑ ↓
Research and development (e.g. pre-treatment of seeds,...)

⋮
↑ ↓
Soft infrastructure (e.g. Automatization, IT, new technologies,...)

⋮
↑ ↓
Diversification of Forest Reproductive Material (e.g. new provenances, new species,...)

⋮
↑ ↓
Human resources (e.g. staff extension, training, education,...)

⋮
↑ ↓
Hard infrastructure (e.g. greenhouses, storage, roads,...)

⋮
↑ ↓
Certification and sustainable governance practices (e.g. certification, standardization, social and environmental sustainability,...)

What would the estimated magnitude of total costs be regarding these three areas, in your opinion?

Please estimate a number:

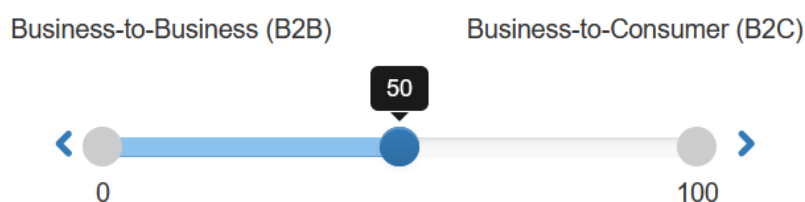
What is your main sales market, estimated in percent (%)?

The slider represents the share of Business-to-Business (B2B) sales. For more Information about the distinction of B2B and B2C, please read the help message.

Additional help available:

1. Business-to-Business (B2B): B2B sales involve transactions of forest tree nursery products and services intended for intermediary trade, re-selling, or refinement by other market participants.
2. Business-to-Consumer (B2C): B2C sales involve direct transactions between the nursery and the end users of forest tree nursery products and services, such as forest owners, forest enterprises, and others.

Move the slider or accept the initial position.



To what other countries do you export seedlings?

Check all that apply.

- | | | | |
|-----------------------------------|------------------------------------|--|---|
| <input type="checkbox"/> Austria | <input type="checkbox"/> France | <input type="checkbox"/> Luxembourg | <input type="checkbox"/> Slovenia |
| <input type="checkbox"/> Belgium | <input type="checkbox"/> Germany | <input type="checkbox"/> Netherlands | <input type="checkbox"/> Spain |
| <input type="checkbox"/> Bulgaria | <input type="checkbox"/> Greece | <input type="checkbox"/> Norway | <input type="checkbox"/> Sweden |
| <input type="checkbox"/> Croatia | <input type="checkbox"/> Hungary | <input type="checkbox"/> Poland | <input type="checkbox"/> Other, please specify: |
| <input type="checkbox"/> Czechia | <input type="checkbox"/> Ireland | <input type="checkbox"/> Portugal | <input type="checkbox"/> I don't export seedlings |
| <input type="checkbox"/> Denmark | <input type="checkbox"/> Italy | <input type="checkbox"/> Romania | |
| <input type="checkbox"/> Estonia | <input type="checkbox"/> Latvia | <input type="checkbox"/> Serbia | |
| <input type="checkbox"/> Finland | <input type="checkbox"/> Lithuania | <input type="checkbox"/> Slovak Republic | |

How often did you face the following challenges regarding market conditions and demand in the last five years?

	never	rarely	sometimes	often	always
High competition with other producers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High labour costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of long-term contracts with costumers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing demand in species you do not produce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing requests for provenances you are not able to provide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulties to find qualified workers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other, please specify:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7 Legal Regulations and Incentives

How satisfied are you with the availability of public incentives (e.g. grants, subsidies or other forms of governmental or public financial support)?

- ☐ Very satisfied
- ☐ Rather satisfied
- ☐ Partially satisfied/partially dissatisfied
- ☐ Rather dissatisfied
- ☐ Very dissatisfied
- ☐ Public incentives do not apply to our nursery

How satisfied are you with the administrative procedures for obtaining these public incentives?

- ☐ Very satisfied
- ☐ Rather satisfied
- ☐ Partially satisfied/partially dissatisfied
- ☐ Rather dissatisfied
- ☐ Very dissatisfied
- ☐ Public incentives do not apply for our nursery

Please classify how positive or negative each policy/legislation is in your perception for your operations at the moment.

[illegible]

If you are not familiar with some of the policies, please note that.

[illegible]

In what kind of areas are you collaborating with other nurseries?

Check all that apply.

- ☐ Exchange of Forest Reproductive Material (e.g. seeds, seedlings,...)
- ☐ Knowledge sharing (e.g. on market demands, co-organized trainings, share of best practices,...)
- ☐ Contractual agreements (e.g. supply services, commercial transactions,...)
- ☐ Sharing of resources (e.g. special equipment, machines,...)
- ☐ Other, please specify:
- ☐ I don't collaborate with other nurseries

How positive or negative would the establishment of a European network of nurseries, facilitating collaboration in the following areas, be for your business operations?

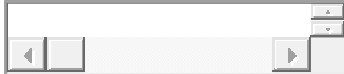
	Very positive	Rather positive	Partially positive/ partially negative	Rather negative	Very negative
Pest and Disease Management: Collaborating on sharing knowledge and best practices for preventing and managing pests and diseases.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory Compliance: Collaborating on staying updated on relevant laws, regulations, and certifications related to plant health, international trade, or environmental protection.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supply Chain Optimization: Collaborating on sharing resources, coordinating logistics, or identifying other synergies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustainable Practices: Collaborating on promoting and implementing sustainable practices such as the use of organic fertilizers, reduction of water consumption, implementation of recycling programs, or adoption of environmentally friendly packaging.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research and Development: Collaborating on projects related to plant breeding, genetic improvement, climate or environmental adaptation of plants, or other relevant research areas.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training and Education: Collaborating on organized training programs, workshops, and seminars covering various topics including propagation techniques, quality control, or nursery management practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology and Innovation: Collaborating on adopting and implementing advanced technologies such as automation, data analytics, remote sensing, or other innovative solutions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Market Intelligence and Market Strategies: Collaborating on the exchange of market insights, trends, or consumer preferences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If there were free-to-use technical nursery guidelines, what topics would you personally be interested in?

Please name your areas of interest:

Navigation icons: back, forward, search, etc.

If you have any further comments, feel free to write them down here:



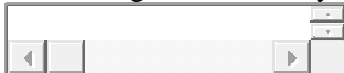
8 Congratulations!

Your Survey Contribution is now complete.

Thank you very much for your help!

If you are interested in learning more about the survey's outcome or are willing to participate in a follow-up business tendency survey, please provide the following information:

Name, Organisation, City/Town, Country:



Email

I am interested in:

Check all that apply.

- ☐ the survey's outcome
- ☐ a follow-up business tendency survey