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18 December 2025

Committee Secretary
Joint Standing Committee on Foreign Affairs, Defence and Trade
PO Box 6021
Parliament House
CANBERRA ACT 2600

Submitted via upload

Dear Joint Standing Committee on Foreign Affairs, Defence and Trade,

RE: Inquiry into strengthening Australia's trade and investment relations with Africa

Please find attached the Australian Seed Federation's submission in response to the Joint Standing Committee on Foreign Affairs, Defence and Trade's inquiry into strengthening Australia's trade and investment relations with Africa.

The Australian Seed Federation welcomes the opportunity to contribute to the discussion on strengthening Australia's trade and investment relationship with African nations. This submission focuses specifically on the seed-for-sowing sector, which plays a critical role in supporting agricultural productivity, food security, and climate resilience in both Australia and Africa.

The ASF welcomes the opportunity to engage with members and government in shaping a strategic and inclusive approach to strengthening Australia's seed-for-sowing trade and investment with African markets.

Please note: ASF members are willing to provide additional confidential sales data should the Committee wish to explore this further. This information has not been included in our submission due to its commercially sensitive nature.

Yours sincerely,

Katherine Delbridge
Chief Executive Officer
Australian Seed Federation

Strengthening Australia's trade and investment relations with Africa

Trade volumes in seed-for-sowing between Australia and African countries could be described as modest. However, these markets present untapped potential. Australia's strengths in research, breeding, and high-quality seed production align well with the needs of many African farming systems — particularly in regions with similar agroecological conditions.

This submission addresses the five areas of inquiry outlined in the terms of reference:

- the nature of Australia's existing trade and investment relations with the region
- identifying barriers and impediments to trade and investment
- identifying opportunities for Australian businesses to diversify exports to specific African markets
- assessing the potential for the African Continental Free Trade Area to stimulate greater economic engagement between Australia and Africa
- the role of the Government in identifying new opportunities and assisting Australian companies to access existing and potential economic opportunities in Africa

1. Current trade and investment relations between Australia and Africa (seed for sowing)

Australia's trade in seed for sowing with African nations is present but limited. While the volume and value of exports are small compared to other regions, there is a clear and traceable trade pattern with countries such as South Africa, Kenya, Egypt and Morocco. These exports indicate existing demand and the presence of functional export channels that can be expanded.

ABARES data indicates the following:

Australian exports of seed for sowing into Sub-Saharan Africa since 2021

Quantity unit	2021-22	2022-23	2023-24	2024-25	2025-26 (Jul - Sep)
Kilograms	1,457,007.08	1,112,816.11	814,941.91	897,925.88	395,771.04

Australian exports of seed for sowing into North Africa and the Middle East since 2021 *note: the largest export destination recorded in this data set is Saudi Arabia*

Quantity unit	2021-22	2022-23	2023-24	2024-25	2025-26 (Jul - Sep)
Kilograms	4,369,928.80	3,827,388.80	2,499,498.42	1,606,483.50	787,633.80

Australian exports of seed for sowing into African nations since 2021 by value:

1. South Africa: AUD 7,169,113
2. Egypt: AUD 2,120,853
3. Sudan: AUD 1,070,844
4. Morocco: AUD 1,060,010
5. Kenya: AUD 434,163

The majority of exports come from South Australia (AUD 5,300,068) followed by Queensland (AUD 1,035,162).

To put this into context, Australia's total seed for sowing exports for 2022 was approximately AUD 162 million, showing that Africa is currently a small export market.

It is important to note that while the majority of Australian seed exports to the region are directed to countries such as South Africa, Kenya, Egypt, and Morocco, some datasets referenced use broader regional trade groupings (e.g. MENA – Middle East and North Africa) rather than strict continental definitions. As Saudi Arabia has traditionally been a significant export market for Australia, its inclusion in the MENA category may skew regional data and should be considered when interpreting trade volumes.

2. Barriers and impediments to trade and investment

Exporting seed for sowing into African markets involves navigating a range of technical, regulatory and logistical challenges. While some are consistent with other international markets, others are specific to the fragmented regulatory environment across African countries. These barriers affect both new and experienced exporters, particularly where standards are not aligned or transparency is limited. Addressing these issues will be critical to enabling consistent, long-term trade growth. Key barriers limiting the expansion of seed for sowing trade into African markets include:

- **Regulatory and biosecurity complexity:** African nations maintain distinct and often stringent import requirements for seed, including phytosanitary certification, seed health testing, and local registration. These vary widely between jurisdictions and can be difficult for exporters to navigate. Seed for sowing has not featured in bilateral investment strategies to date.
- **Lack of harmonised seed standards:** Africa nations lack a unified framework for seed certification and varietal registration, requiring exporters to repeat processes across multiple countries. This regulatory complexity creates a significant administrative burden and reduces the region's overall attractiveness as a destination for seed trade.

- **Financial risk and limited trade finance options:** Exporting to parts of Africa can involve heightened payment risk due to limited availability of trade insurance, variable enforcement of contracts, and restricted access to secure payment mechanisms. Exporters may struggle to secure competitive trade finance or export credit insurance for some African markets, especially in countries with less stable financial systems. This constrains the willingness of Australian exporters to take on new trade relationships in the region.
- **Data limitations:** Public global trade datasets do not consistently disaggregate non-vegetable seed types such as pasture, forage, legume, or cereal seed, obscuring market potential and hindering strategy development.
- **Infrastructure and logistics issues:** Limited cold chain infrastructure and customs delays at African ports can compromise the viability of some high-value or treated seed.
- **Limited in-market intelligence:** Market demand data for seed varieties is sparse or not publicly available in many African countries, making market selection and forecasting more challenging for exporters.
- **Language barriers:** Language differences, particularly the prevalence of French in West African countries, can present practical barriers to trade facilitation, documentation, and relationship-building for non-Francophone exporters.
- **Data sources:** While ABARES is used as a general reference, members have also identified ABS as a key source for disaggregated seed data, particularly when analysing trade by seed type. Greater use of ABS seed-specific statistics may improve data clarity.
- **Access to variety lists:** Accessing national variety lists, which outline the seed varieties or species a country has approved for import, remains a practical challenge. ASF members report that even regional organisations, such as the African Seed Trade Association (AFSTA), have faced difficulties obtaining consistent and up-to-date varietal data. Government support to improve transparency and access to these lists would help remove a significant barrier to trade.
- **Indigenous/native seed legal complexities:** Some ASF members are active in the native seed sector. When sourcing seed from Indigenous lands within Australia for export, particularly native species, legal and ethical considerations arise, including the need for Free, Prior and Informed Consent (FPIC) and Access & Benefit-Sharing (ABS) agreements under Native Title and other Indigenous rights frameworks.

3. Opportunities for Australian businesses to diversify exports to African markets

Africa's agricultural systems are highly diverse, ranging from large-scale commercial farms to widespread smallholder operations. This diversity creates opportunities for tailored seed solutions, especially in climates that align with Australian breeding strengths.

There is also growing interest in imported seed technologies and agronomic support across many regions. With the right strategy and support, Australian businesses are well positioned to expand into these emerging and under-serviced markets:

- **Expansion into pasture, forage, and cereal seed:** Australia's strength in breeding for tropical and dryland farming systems aligns well with many African agroecological zones, particularly in East and Southern Africa. These seed types are underrepresented in current trade flows and data.
- **Collaboration in research and varietal development:** There is scope to engage in bilateral or regional R&D initiatives to co-develop or test seed varieties suited to African environments, particularly through organisations such as ACIAR or CSIRO-linked programs.
- **Adapting products for smallholder systems:** Many African farmers operate at small scale. Offering seed in formats and price points appropriate for these systems could open access to a wider base of customers.
- **Value-added export models:** Providing agronomic advice, stewardship support, or bundled services alongside seed exports could enhance competitiveness and adoption.
- **Digital and regional distribution pathways:** As digital input supply systems expand in parts of Africa, particularly East Africa, new avenues for seed distribution are emerging. Regional consolidation hubs may also facilitate more efficient trade.
- **Native seed exports and licensing considerations:** The growing interest in restoration and native seed markets in Africa may create opportunities for Australian exporters. However, sourcing native seed from Indigenous lands in Australia introduces distinct governance, consent, and traceability requirements. The package of measures to enhance the Multilateral System of Access and Benefit Sharing did not receive approval at the Plant Treaty's (ITPGRFA) eleventh governing body in Peru in November 2025, therefore the current MLS arrangements remain in place.

4. The potential of the African Continental Free Trade Area (AfCFTA)

The AfCFTA aims to reduce trade barriers and boost intra-African commerce, but it also has implications for external trading partners. Although still in early implementation, AfCFTA represents a structural shift in how seed and other agricultural inputs might move across African markets in future. For long-term export strategy, it is worth tracking and engaging with this evolving policy landscape. The AfCFTA presents a long-term opportunity for Australian exporters to engage more efficiently with African markets by:

- Reducing intra-regional tariffs and border delays.
- Enabling harmonisation of seed certification and phytosanitary standards across participating countries.

- Facilitating regional distribution models, where Australian seed enters a single market and is distributed across multiple neighbouring countries.

Regional blocs such as COMESA are already progressing seed policy harmonisation, providing a foundation for AfCFTA implementation. The COMESA Seed Harmonization Implementation Plan (COMSHIP) aims to streamline seed certification, variety release, and phytosanitary measures across 21 member states. Engagement with these regional initiatives offers a near-term opportunity for exporters to test and scale market entry strategies in Eastern and Southern Africa.

5. The role of government in identifying and supporting economic opportunities

Export growth into complex or emerging markets rarely occurs without coordinated support. Government has a key role in facilitating trade, reducing technical barriers, and providing industry with timely and relevant intelligence.

Strategic investment in data, diplomacy and export tools can help de-risk engagement with African markets. This support is particularly important in a sector like seed, where market development is closely linked to regulation, stewardship, and long-term relationships. To support the expansion of seed for sowing trade with Africa, Government could play a key role in the following areas:

- **Data and market intelligence:** Improve disaggregation of seed export data by type and region through ABARES and DFAT. Commissioning African market opportunity assessments would also support exporters.
- **Regulatory engagement:** Support bilateral or multilateral discussions on seed certification and phytosanitary standards to facilitate smoother trade pathways. Australia could also encourage African participation in OECD seed schemes or similar harmonisation platforms.
- **R&D partnerships:** Facilitate collaborative research and demonstration projects to trial Australian varieties in African conditions, supported by technical cooperation programs.
- **Exporter support:** Provide tailored market briefings and in-market support for Australian seed exporters via Austrade and agricultural counsellor networks.
- **Promotion and visibility:** Include seed for sowing in targeted trade missions and Africa-focused engagement strategies, ensuring representation of the sector in broader agricultural dialogues.
- **Native seed specific:** To strengthen Indigenous participation in native seed exports, targeted government support is needed to build the capacity of Traditional Owners across seed collection, handling, and compliance processes.

The upcoming African Seed Trade Association (AFSTA) Congress, to be held in Cape Town from 23–25 March 2026, presents a timely opportunity for Australian government and industry representatives to engage directly with African seed sector stakeholders. Participation could support relationship-building, information exchange, and the identification of potential trade and regulatory partnerships.

6. Conclusion

Australia's seed for sowing exports to Africa remain a small but meaningful component of our agricultural trade profile. The existing trade relationships reflect a foundation on which to build, particularly in markets with aligned agroecological conditions and growing demand for high-quality seed. Unlocking the potential of these markets will require coordinated action from industry and government. Addressing regulatory barriers, improving data visibility, and supporting targeted export readiness will be essential to progressing from opportunity to sustained commercial engagement. With early engagement in regulatory and trade frameworks such as AfCFTA, Australia can help shape a more enabling environment for future seed trade.

The ASF looks forward to continuing discussions with members and government to support a strategic and inclusive approach to expanding Australia-Africa trade in seed for sowing.

About ASF

The Australian Seed Federation (ASF) is the peak industry body representing the entire Australian seed supply chain.

From research and breeding through to production, distribution, export, and retail, our members are at the core of innovation, productivity, and sustainability across agriculture, environmental restoration, and home gardening sectors.

We advocate for an efficient, profitable, and internationally competitive seed industry — supporting all seed types, business sizes, and market segments.

The feedback informing this submission reflects the views of ASF members across both the forage and pasture grass industry as well as the native seed sector.