National Agritech Strategic Plan for Australia

White Paper: Establishing the Foundations for National Action

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Australia does not lack agricultural innovation. It lacks coordinated pathways to scale. The Position Document diagnosed the structural barriers limiting adoption and impact. This White Paper builds on that foundation, affirming three Strategic Pillars and establishing the strategic logic needed to advance toward a fully developed National Agritech Strategic Plan.

Define: Agriculture Technology, Agritech, also known as Agtech, is the application of technology, digital solutions, and innovative products to enhance agriculture, fisheries, and forestry. It includes a range of tools, such as sensors, farm management software, robotics, artificial intelligence, and biotechnology, aimed at improving productivity, sustainability, and profitability across the agrifood supply chain.

Executive Summary

Despite world-class research capabilities, more than 600 agritech companies, and vast natural resources, Australia is struggling to translate innovation into scaled, on-farm and supply chain impact that drives productivity and competitiveness. Proven technologies exist across the system, yet adoption remains uneven, and pathways to commercial scale are unclear. This is not an innovation problem; it is a coordination and adoption crisis.

Targeted consultation across government, industry, investors, researchers, and producers reveals a fragmented ecosystem focused on innovation creation rather than adoption. While 65% of agritech companies are self-funded and one in four face viability concerns, millions in public funding flow toward duplicative programs delivering limited measurable impact. The feedback is consistent: too much innovation, not enough impact. Execution gaps and unclear accountability mechanisms are consistently identified as limiting impact. And a desperate hunger for coordinated action and measurable results.

Agritech is the fastest lever Australia controls to lift productivity, resilience, sustainability, and competitiveness across the agrifood supply chain. This White Paper establishes the case for urgent, coordinated national action through three Strategic Pillars: accelerating commercialisation and adoption, strengthening collaboration across innovation, industry and government, and embedding agritech as core infrastructure for modern agriculture.

1. Why National Coordination Matters Now

Australian agriculture faces a perfect storm of pressures. Climate variability is intensifying, requiring adaptive, data-driven decision-making that producers don't yet have the tools to execute. Workforce shortages are acute and worsening, demanding automation and efficiency gains that remain out of reach for most producers. Market volatility necessitates improved resilience that technology could provide, but policy frameworks don't enable.

Global competitors are investing heavily in agricultural technology, threatening our market position. Sustainability expectations from consumers, regulators, and trading partners continue to intensify, creating compliance requirements that manual systems cannot meet.

Despite these pressures, productivity growth has slowed even as investment in research and development has continued. The data is clear: technology adoption, rather than new discovery, has the largest potential to drive productivity gains. Yet widespread adoption remains elusive. Companies with proven solutions cannot access the capital, commercial trials, or pathways to reach farmers. Producers want technology but face unclear ROI, implementation risk, and limited trusted advice. The gap between what is possible and what is practised widens daily.

Between May 2025 and January 2026, AusAgritech conducted targeted consultation through verbal consultations, written submissions, virtual meetings, and digital surveys with agritech companies, investors, producers, government agencies, RDCs, and research institutions. The feedback converged on three themes: fragmentation is killing impact, execution is poor, and no one is accountable. Stakeholders are exhausted by duplication, frustrated by bureaucracy, and hungry for leadership that delivers results, not rhetoric.
This White Paper responds to that call. It builds on the May 2025 Position Document, synthesises targeted consultation, and sets the strategic framing for Australia's first National Agritech Strategic Plan. Broader consultation throughout 2026 will refine priorities and delivery mechanisms. But the direction is clear, the need is urgent, and delay is not an option.

2. Three Strategic Pillars: The Framework for Action

Three Strategic Pillars emerged from the Position Document and were strongly validated through targeted consultation, representing the foundational shifts required to transform Australia's agritech ecosystem from fragmented to coordinated.

1. **Pillar 1: Accelerating Commercialisation and Adoption**
   Consultation revealed a consistent pattern: Australia's challenge is not invention but what happens after. Companies validated they can prove technology works, but accessing capital, partnerships, or pathways to reach commercial scale is where they consistently stall. Producers described wanting clearer ROI and lower risk before adopting. Investors pointed to too much uncertainty in pathways to scale and exit. The gap isn't in innovation capacity - it's in the pathway from proof-of-concept to commercial deployment.

   This pillar addresses the critical transition from validated technology to scaled adoption. It focuses on coordinated trial and validation approaches that could reduce commercialisation timelines, capital models better suited to agritech's longer development cycles, independent assessment frameworks that build producer and investor confidence through transparent ROI data, and pathways

that retain IP, talent, and value in Australia rather than forcing companies offshore to scale.

2. **Pillar 2: Strengthening Collaboration Across Innovation, Industry and Government**
   The consultation feedback on fragmentation was emphatic. Stakeholders described multiple agencies, departments, RDCs, and jurisdictions funding similar platforms, pilots, and research without coordination. They pointed out that different entities optimise for different metrics - publications, patents, programs launched - without alignment on verified adoption. Collaboration happens through individual relationships, not system design. The result, as they described it, is duplication, confusion, and wasted resources that could otherwise support actual deployment.

   This pillar addresses the structural barriers to coordination. It focuses on creating visibility across activities without centralising control, defining clearer roles so entities operate in their areas of strength, developing shared standards so one validation can be trusted nationally, and creating incentives that make collaboration easier and more rewarding than duplication.

3. **Pillar 3: Embedding Agritech into the Future of Australian Agriculture**
   Consultation consistently highlighted that agritech remains optional - something for early adopters rather than essential infrastructure for all producers. Regional capability and confidence vary dramatically. Producers described purchasing technology but lacking the skills or support to use it effectively. Stakeholders across the board pointed out that regulatory frameworks, procurement guidelines, and industry standards were designed for pre-digital agriculture and now actively constrain rather than enable innovation.

   This pillar addresses the need to shift agritech from peripheral to central. It focuses on building regional advisory capacity that combines agricultural and technology expertise, developing workforce capability through education and training pathways, reforming policy frameworks to treat agritech as core infrastructure, and supporting domestic manufacturing capability in areas critical to food security and strategic advantage.

3. The Reality: Capability Without Coordination

Australia possesses genuine advantages. Universities and research institutions consistently produce world-class innovation. Over 600 agritech companies span precision agriculture, robotics, livestock management, data analytics, biological solutions, and supply chain technologies. Strong producer interest exists where value is demonstrated. International markets seek the productivity-enhancing and climate-smart solutions Australia could export if we prove viability domestically first.

Systemic failures prevent impact at scale. Undercapitalisation drives companies offshore or out of business, taking IP and value with them. Commercialisation pathways remain relationship-dependent rather than system-enabled, creating inequitable access. Many innovations emerge from technology-first exploration rather than problem-first development, reducing relevance. Limited collaboration persists as competitive pressures fragment efforts. Commercial trial access remains ad hoc and time-consuming. Mechanisms to retain IP and value onshore receive insufficient policy attention.

The broader system compounds these failures. Heavy reliance on short-term grants over scale capital means companies struggle after proof-of-concept. Siloed decision-making across RDCs, government agencies, and jurisdictions prevents strategic alignment. Innovation activity is measured while adoption outcomes are ignored, and success is defined by publications and programs launched rather than by farms transformed and productivity lifted.

The core insight is inescapable: Australia has capability but lacks coordination, execution, and support. The system is optimised for innovation creation, not innovation adoption. Without addressing this fundamental misalignment, continued investment will yield diminishing returns while our global competitors capture the value Australian research creates.

4. System Performance: Learning from Success and Failure

Some mechanisms demonstrate what effective support looks like. The Industry Growth Program combines funding with advisory capability, aligning with commercialisation needs. The R&D Tax Incentive supports long development cycles without favouring specific technologies. The On-Farm Connectivity Program addresses enabling infrastructure rather than mandating solutions. The Export Market Development Grant reduces the upfront risk of international expansion for Australian companies. These programs share characteristics: they enable rather than prescribe, combine capital with capability, let industry lead, and measure impact.

Across underperforming initiatives, five clear patterns of waste emerge:

1. Building platforms instead of enabling markets. AgTech Finder, the Australian Agricultural Data Exchange, and the SmartSat CRC Ag Digital Twin project illustrate the risk of infrastructure-first design where commercial demand and adoption pathways are not clearly validated. This pattern reveals government preference for controlled infrastructure over market-led solutions, absorbing capital that could fund company growth or adoption programs.
2. Measuring activity instead of outcomes. Future Farming projects and endless consultation cycles demonstrate high spending on pilots and reports measured by completion rather than ongoing use. Activity metrics like grants awarded and reports delivered are easy to measure but meaningless. The fix requires tying renewal to verified adoption and sunsetting programs without demonstrated pathways to scale.

3. Funding intermediaries instead of direct support. Drought Hubs, CRCs, and similar structures demonstrate the structural tension between institutional funding models and commercial deployment needs. This reflects systems more comfortable funding familiar institutions than backing commercial companies scaling solutions.
4. Designing generically instead of specifically. Accelerator programs and state innovation schemes apply software startup models to agritech, ignoring agricultural timelines, capital intensity, regulatory complexity, and seasonal constraints. The disconnect between designers and users is stark.
5. Reporting compliance instead of delivering impact. Programs renew based on governance compliance rather than adoption achieved. When no entity owns adoption rates or productivity improvements, systems optimise for defensible activity over impactful results.

Australia's challenge is not program quantity but coordination quality, accountability clarity, and commercial alignment. Programs that work enable markets, measure impact, and engage industry as co-designers. Programs that fail build instead of enable, measure activity instead of outcomes, and operate without accountability. The solution is not more programs but better ones.

5. The Path Forward: From Insight to Implementation

This White Paper does not prescribe individual programs, funding allocations or agency responsibilities. Those elements will be developed through broader consultation in the Strategic Plan phase. This document establishes the structural shifts required to enable adoption at scale. The Strategic Plan phase will translate these reform directions into a sequenced implementation roadmap with defined ownership, measurable targets and accountability structures.

Realising the Strategic Pillars requires five specific reform directions:

1. Make adoption the metric. Rebalance funding toward commercialisation and extension. Require verified adoption metrics in all publicly funded initiatives. Incentivise industry-led validation over researcher-led pilots. Introduce adoption scorecards. Sunset programs lacking pathways to scale. Reward verified impact at commercial scale.
2. Build national frameworks. Create a national agritech validation framework with standardised protocols and mutual recognition across jurisdictions. Build shared digital infrastructure for trial data, enabling one validation to serve nationally. Establish clear, non-overlapping roles across RDCs, agencies, and jurisdictions.
3. Enable patient capital. Develop government co-investment in sector-specific growth funds with 7-10 year horizons. Create tax incentives rewarding long-term agritech investment, and producers lead agritech adoption. Establish blended finance models combining public catalytic capital with private growth capital suited to agricultural timelines.

4. Strengthen regional capability. Fund regional technology advisory roles ensuring every agricultural region has trusted expertise. Train existing advisors and agronomists in technology integration. Support producer-led peer learning networks that accelerate adoption through demonstrated ROI.
5. Design for delivery. The National Agritech Strategic Plan and Implementation Roadmap will detail priority initiatives with timelines, ownership, and resourcing. It will specify structural reforms addressing systemic barriers. It will establish delivery mechanisms, governance frameworks, and accountability measures. Most critically, it will be designed for execution not aspiration, identifying who delivers what, how progress gets measured, and what consequences follow underperformance.

This White Paper establishes strategic direction. Broader consultation throughout 2026 will validate priorities and refine mechanisms through producer forums, regional roundtables, on-farm consultations, investor roundtables, company surveys, and topic-specific working groups. The outcome will be a Strategic Plan unlike previous strategies that remained aspirational; this one will be designed for delivery with clear accountability.

Stakeholders can contribute through formal submissions, regional engagement, digital surveys, and working groups. Details will flow through AusAgritech channels and stakeholder networks. The invitation is open. The timeline is tight. The need is urgent.

6. The Choice Before Us

Australian agriculture has the potential to exceed $100 billion in farm gate output by 2030. The resources exist. The expertise exists. The innovation capability exists. What has been missing is the coordination that turns capability into impact.

We now understand the problem with clarity; this is not an innovation crisis but an adoption crisis. The ecosystem is fragmented, under-coordinated, and measuring the wrong things. Public investment flows toward activity while outcomes languish. Some programs work. Many waste resources. The divergence is stark, and the cost is mounting.
We also understand the solution: three Strategic Pillars that accelerate commercialisation and adoption, strengthen collaboration across silos, and embed technology as infrastructure not an option. These are not theoretical constructs; they emerged from consultation, proved through international comparison, and validated by what already works in pockets of the Australian system.

What remains is choice. Competitor nations are investing heavily in agricultural technology. The window to lead is closing and delay means falling further behind. Continued fragmentation means continued underperformance and more of the same means missing the $100 billion target while watching others capture value from Australian research.
The Australian Agritech Association commits to convening stakeholders, driving alignment, and advocating for necessary reforms. But success requires collective action

across government, industry, investment, research, and production. It requires accountability where none existed. It requires measuring what matters. It requires designing for delivery, not aspiration.

Acknowledgements
AusAgritech represents agritech companies across Australia and exists to strengthen the conditions for innovation to translate into measurable impact. This White Paper reflects targeted consultation undertaken between May 2025 and January 2026 across the broader agritech ecosystem, including agritech companies, producers, investors, government agencies, RDCs, research institutions, regional networks and industry bodies.

The AusAgritech thanks the AusAgritech Committee, Leaders Alliance and members, along with all contributors who provided input on a de-identified basis, enabling open and constructive discussion of both system strengths and structural challenges.

The Strategic Plan phase will broaden engagement further, particularly with producers and industry stakeholders adopting technology on the ground, to ensure reforms are co-designed and grounded in practical delivery realities.

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