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# Canada's Agriculture and Food Innovation Statement and Recommendations: Where the Conversation Stands

A *What We Heard* Report prepared for CAPI  
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*What We  
Heard Report*



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The Canadian Agri-Food Policy Institute's mission is to lead policy development, collaborate with partners and advance policy solutions within agriculture and food.



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This document reflects key themes and feedback from a workshop and dialogue convened by CAPI in partnership with Agri-Food Research, Innovation, Skills & Education (AgRISE), as part of CAPI's broader multi-phase initiative on Canada's agri-food innovation system.

To ensure the validity and quality of its work, CAPI requires all reports to go through a peer review process. CAPI thanks the peer reviewers for their comments on an earlier draft of this report.

# CANADA'S AGRICULTURE AND FOOD INNOVATION STATEMENT

FROM PROOF TO IMPACT AT SCALE




The Next Policy Framework is an opportunity to transform the innovation system and translate ideas into impact.

## The challenge isn't generating innovation

Canada produces strong research and promising technologies. Yet too few consistently reach commercialization, adoption at scale, and long-term economic return.

## The persistent 'missing middle'

A gap exists between validated innovation and commercial deployment in scale-up capital, modernization support, infrastructure, and adoption incentives.

-  Investment gaps
-  Program fragmentation
-  Regulatory barriers

## The Innovation Statement: A North Star

A clear definition of the outcomes Canada's agri-food innovation system should consistently deliver.

**Canada becomes a global leader in turning innovation into impact across agriculture and food. Impact is achieved through increasing investment and adoption and measured by growing productivity, resilience, and value creation.**

## Three recommendations for the NPF

Ambitious but achievable changes governments can make

1

### Strengthen innovation leadership and prioritization

Clear direction, stronger alignment, and accountability for results.

2

### Modernize the regulatory system

Improve predictability, transparency, and conditions for commercialization, adoption, and investment.

3

### Reform and renew programs

Strengthen the path from proof-of-concept to commercialization, modernization, adoption, and scale.

## What does success look like?

Four signals the system is working



### Speed

Faster movement from proof to commercial use



### Scale

Stronger adoption at scale



### Capital

More private investment relative to public funding



### First-to-market

More innovations commercialized first in Canada

## Note from CAPI

Over the past year, CAPI has led a multi-phase initiative to help shape a more coherent and effective agri-food innovation system in Canada. This work has combined system analysis, national stakeholder engagement, dialogue-based testing of emerging ideas, and structured convening across the innovation continuum. The objective has been to build consensus on the main challenges and opportunities facing Canada's agri-food innovation system, co-develop a practical framework for action, and ground policy direction in evidence, operational realities, and the experience of those working across the sector.

That process has reinforced a consistent message: Canada's main challenge is not generating innovation, but ensuring it moves through the system and delivers measurable impacts. It has also shown the value of creating space for funders, researchers, industry, and producers to test assumptions, challenge language, and refine priorities together. Stronger policy direction is more likely to hold when it reflects how the system actually works and where it breaks down in practice.

This report reflects one part of that broader CAPI-led initiative. It draws on the February 2026 AgRISE workshop, which focused particularly on commercialization, adoption, and scaling. Its purpose is to capture where the discussion became clearer, where perspectives are converging, and how the Innovation Statement and supporting recommendations were refined through dialogue.

## Key Takeaways

1. **Agri-food innovation needs to work across the full pathway from research to scale.** The direction that emerged more clearly from the workshop is a system that translates research and validated technologies into commercialization, adoption, and scale across the value chain.
2. **Stronger direction and accountability are needed to reduce fragmentation.** The system has no shortage of activity, but lacks clear priorities, aligned action, and a practical mechanism to address barriers that cut across governments and sectors.
3. **Regulatory uncertainty continues to slow commercialization and adoption.** Clearer pathways, more predictable timelines, and better coordination would improve the conditions for firms, investors, and adopters to move innovation forward.
4. **The missing middle remains a major weakness in the system.** Commercialization, modernization, adoption, and later-stage growth continue to be under-supported relative to where the system needs to perform.
5. **More investment will have limited effect without changes in system design.** Funding matters, but outcomes will continue to fall short if governance, regulation, program pathways, and enabling conditions do not improve alongside it.

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## Context and purpose

This report reflects insights from the February 2026 AgRISE<sup>1</sup> workshop and is intended to support continued discussion and alignment on agri-food innovation as policy conversations move forward, including around the Next Policy Framework.

The workshop focused primarily on the later stages of the innovation continuum, including commercialization, adoption, and scaling. It should be read as one component of a broader body of work developed through CAPI's agri-food innovation initiative, including [earlier analysis](#) on agricultural R&D and system-wide challenges. Taken together, this work highlights that Canada faces constraints across the full innovation pathway, from foundational research and infrastructure to commercialization and adoption.

This report concentrates on where the February 2026 workshop discussion added the most clarity, particularly around scaling and system performance, while recognizing that these challenges are interconnected with upstream capacity, funding, and talent constraints.

Its purpose is to show where the discussion has become clearer, where the innovation statement and

recommendations have gained sharper definition, and where further dialogue should be focused. The workshop was designed to refine the North Star,

*Over the past year, CAPI has convened stakeholders from across the agri-food systems to build consensus and alignment around the main challenges, opportunities, and policy directions for what a 21st century agri-food innovation system should look like in Canada.*

stress-test the recommendations, and identify what could realistically move in the current policy window.

A consistent starting point runs through the process. Canada's agri-food innovation system has delivered major breakthroughs, supported by strong research institutions and sustained innovation activity across the system. The central challenge is not the generation of innovation, but its translation into commercial use, adoption at scale, and stronger economic performance across the value chain.

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<sup>1</sup> AgRISE In-Person Workshop (February 11, 2026); Full-day structured workshop, 42 participants, six mixed tables, facilitated by Deans Council members. Opening remarks by the Honourable Heath MacDonald, Minister of Agriculture and

Agri-Food Canada. Four working sessions: Innovation Statement and North Star; Leadership and Governance; Regulatory Modernization; Program Reform.

# Strengthening the agri-food innovation continuum

The Next Agricultural Policy Framework creates an opportunity to address both funding and system design. Without structural change, additional investment risk reinforcing existing bottlenecks is unlikely to deliver the productivity, resilience, and value-added growth Canada is seeking. System design will determine whether investment compounds or dissipates.

Workshop discussions emphasized bottlenecks in commercialization, adoption, and scale. At the same time, participants noted that constraints earlier in the pathway, including research capacity, infrastructure, and talent development, continue to shape system performance and long-term innovation outcomes.

## The Innovation Statement

The Innovation Statement defines the outcomes Canada's agri-food innovation system should consistently deliver and the direction against which progress should be judged. It is intended to guide policy, investment, and system priorities, helping align efforts across the innovation continuum around adoption, scale, and measurable results.

The draft North Star that went into the workshop for test and refinement was intentionally ambitious. It framed the goal **as making Canada the easiest place in the G7 to take agri-food innovation from proof to scaled adoption, so that Canada captures meaningful global market share and sees stronger farm profitability and GDP growth.** That framing was useful because it placed the bottleneck at scaling rather than invention and pushed the discussion toward outcomes rather than inputs.

### What became clearer through the workshop

- The core bottleneck is scaling and commercialization, not idea generation.
- The North Star should be written in outcome terms and serve as a performance expectation for the system.
- Success should be judged by what the system delivers consistently, not by research activity alone.

The discussion reinforced a system pattern:

- A. Canada performs relatively well in generating ideas and early-stage innovation
- B. Performance weakens through development, testing, and incubation
- C. The largest losses occur in commercialization and adoption at scale.

The issue is not a single-stage failure. It is weak continuity across the pathway and insufficient alignment of the conditions required to move innovation from proof-of-concept to widespread use.

- Innovation is not invention alone. It is invention multiplied by commercialization multiplied by adoption. Canada is reasonably strong on invention. Where the system loses value is in the commercialization and adoption stages. A statement that reflects that distinction is more honest and more useful as a policy anchor than one that treats innovation as a generic term.
- "Agri-food" emerged as the more appropriate frame for many participants, rather than agriculture in a narrower sense.
- A statement framed primarily around farm profitability leaves out the rest of the value chain, including processing, value-added manufacturing, and export markets.
- "Market-driven" was offered as language that captures economic performance across the chain rather than at the farm gate only.
- There was a strong push toward a stronger link between innovation, resilience, value-added growth, and food security.
- The wording around "easiest" and the G7 comparison drew questions. There was concern that "easiest" could be read as speed without rigor or as weaker standards, while the G7 frame felt too narrow for a sector competing in broader global markets.

## Innovation statement as refined through the workshop

Two potential directions emerged more clearly through the workshop:

### Direction 1

**Canada's agri-food innovation system should reliably translate research and validated technologies into widespread adoption and commercial scale, strengthening farm profitability, value-added growth, and national resilience.**

### Direction 2

**Canada operates an agile, market-driven, and collaborative agri-food innovation system where trusted innovation scales across diverse regions and reaches global markets with speed and impact.**

Taken together, these directions point toward a stronger merged agri-food innovation statement:

**Canada becomes a global leader in turning innovation into impact across agriculture and food. Impact is achieved through increasing investment and adoption and measured by growing productivity, resilience, and value creation.**

This formulation carries forward the strongest elements of both directions. It keeps the focus on reliability, translation, and scale. It brings in market-driven and collaborative language that better reflects value-chain performance. It also broadens the outcome frame beyond farm profitability alone.

Progress toward the North Star needs to be tracked through a combination of system-level indicators. These indicators are not intended to be final targets or standalone measures of success. They are a starting point for assessing whether Canada's agri-food innovation pathway is becoming faster, more connected, and more effective at moving ideas into use.

No single indicator can show whether the system is working. Taken together, these measures can help track progress over time and support a more efficient conversation about where the system is improving and where bottlenecks remain.

Type of measure	Indicator	Candidate Target	What it signals
<b>System speed</b>	Shorter time from validated proof-of-concept to first commercial use	Significant reduction within five years, benchmarked against current timelines and comparable jurisdictions	Regulatory and program systems are reducing delays between validation and market entry
<b>Translation into use</b>	Higher rates of innovations reaching defined, context-specific scale thresholds within a defined period	Improvement against current baseline, with thresholds defined by sector and innovation type	The system is moving more innovations into real-world use, not only supporting research activity
<b>Capital formation</b>	Stronger private investment relative to public funding in late-stage innovation	Establish baseline first, then set a phased target for private-to-public leverage	Public funding is beginning to attract private capital where market conditions support it
<b>Competitiveness and first-market potential</b>	More innovations being commercialized first in Canada	Sustained annual growth, tracked against baseline and innovation type	Canada is becoming a more attractive place for innovators and investors to launch and scale

These indicators are shaped by both policy and market conditions. Their purpose is not to assign direct accountability to any single actor. Their purpose is to provide a shared view of system performance and help determine whether public policy, regulation, programs, extension, and market conditions are working together more effectively over time.

### Future areas for dialogue

- Whether the North Star should remain a single system-wide statement or be paired with more focused priority areas or “constellations” where Canada intends to lead.

- How explicitly the final wording should speak to global leadership, North American competitiveness, or domestic resilience and food sovereignty.
- Which success measures/indicators would make the innovation statement credible and shift accountability from program activity to system outcomes.

The three following action-oriented recommendations are intended to support more aligned discussion in the next phase of policy development and to help move the agri-food innovation system toward the North Star in a way that is ambitious, but achievable.

## Recommendation 1: Strengthen Innovation Leadership and Prioritization

The innovation leadership discussion started from a general consensus identified through earlier phases of the initiative. Canada does not lack meetings, programs, institutions, or bilateral arrangements. What it lacks is a structure that aligns them around shared system outcomes.

Earlier work had already pointed to diffuse accountability despite high activity. The draft recommendation included **a National Agriculture and Food Innovation Strategy, and some form of Federal-Provincial-Territorial forum to reduce fragmentation and improve accountability**. The workshop helped answer questions around scope, authority, and institutional form of the forum and other components of the recommendation.

### What became clearer through the workshop

- There was broad support for a National Agriculture and Food Innovation Strategy and for some form of Federal-Provincial-Territorial innovation forum.
- Support became stronger when those ideas were tied to a limited set of outcome priorities, clearer delivery logic, and accountability for results rather than activity alone.
- The central governance problem was framed less as a shortage of activity and more as a lack of alignment, authority, and accountability.
- Participants did not appear to want a new layer of bureaucracy for its own sake.

- The preferred direction was closer to a model that preserves regional strengths while creating a clearer national centre of gravity for priority-setting, barrier resolution, investor signalling, and accountability.
- Private-sector participation was repeatedly treated as part of the governance concept, not as a later addition.
- Agricultural portfolios alone do not control all of the levers that shape innovation performance. Regulatory, fiscal, infrastructure, transport, and workforce issues all influence whether innovation reaches scale.

### Recommendation as refined through the workshop

Canada needs clearer direction and stronger accountability across the agriculture and food innovation system. Significant work is already taking place across governments, industry, research institutions, and the private sector. The challenge is that priorities, decision-making, and responsibility for outcomes remain fragmented across mandates, jurisdictions, and policy areas.

Stronger leadership should focus on increasing ambition, setting priorities, aligning action, improving coordination across key levers, and tracking system performance across the innovation continuum. This includes recognizing that many of the conditions shaping innovation outcomes, including regulation, infrastructure, workforce, immigration, and

investment conditions, extend well beyond the federal and provincial agriculture portfolios alone.

### Priority actions

- **Establish a National Agriculture and Food Innovation Strategy** with focused priorities, clear outcomes, and performance measures to track results, guide investment and inform decision-making.
- **Create a senior-level Agriculture and Food Innovation Forum**, with federal, provincial, and private-sector participation to align priorities, identify system bottlenecks, and coordinate action across jurisdictions and departments.
- **Give the Forum a defined implementation and accountability role** by requiring it to identify priority bottlenecks, assign lead responsibility,

track progress, and elevate unresolved barriers where needed.

### Future areas for dialogue

- Institutional form. Participants explored hub-like, industry-led, agency, or champion models, while also questioning what is realistic in a fiscally constrained environment.
- Whole-of-government reach. There is agreement that agriculture ministries alone cannot solve the problem, but the mechanism for wider alignment still needs further shaping.
- The balance between national direction and regional flexibility. That principle appears widely supported, but the operating model still needs refinement.

## Recommendation 2: Modernize the Regulatory System

This recommendation also entered the workshop as a relatively wide package. **The initial framing pointed to Regulatory Burden Reduction Fund, regulatory pilots, and greater use of outcome-based approaches where appropriate as a possible way to reduce friction and improve innovation uptake.** That was useful in surfacing issues, but it also risked being too broad. Without further refinement, “regulatory modernization” could mean many different things to different stakeholders and could easily be misunderstood as a call to weaken standards.

### What became clearer through the workshop

- There was broad support for regulatory modernization as part of the innovation agenda, but also a strong preference for keeping the recommendation targeted rather than broad or abstract.
- The main concern was uncertainty in timelines, sequencing, and communication, and the effect that uncertainty has on adoption, investment, and commercial deployment.
- The discussion moved toward clearer pathways, known milestones, and more predictable decisions that firms, investors, and adopters can plan around.
- Regulatory pilots were seen as useful where they can safely test faster, clearer, or more flexible approaches and generate practical lessons for wider reform.

- Outcome-based or standards-based approaches were seen as useful in some areas, but only where rigor, safety, and public trust can be maintained.
- There was also support for stronger domestic harmonization and closer alignment with relevant international standards and equivalency approaches.
- Participants cautioned against turning regulatory modernization into a catch-all category. There is a push for focus on the areas that create the greatest barriers to adoption and investment certainty.

### Recommendation as refined through the workshop

Regulation shapes innovation outcomes through timelines, predictability, transparency, and the cost of bringing new products, tools, and processes into use. When regulatory systems work well, they support investment, adoption, and public trust. When they do not, they create uncertainty, slow commercialization, and weaken competitiveness.

While not traditionally part of the policy framework, regulations have a critical impact on the sector and modernization is critical to delivering the outcomes the framework should aim to achieve. The priority is modernization in the areas that most directly affect commercialization, adoption, and investment certainty, and time-to-market. The objective is a

system that remains rigorous while becoming more predictable, responsive, and easier to navigate.

#### Priority actions

- **Create a Regulatory Burden Reduction Fund** to invest in regulatory modernization priorities and encourage more ambitious action.
- **Strengthen domestic harmonization and international alignment**, including changes to further reduce barriers to internal trade and recognition of equivalent foreign and international standards and approvals.
- **Establish shared regulatory modernization priorities, pursue pilots and conditional approval pathways** and report publicly on **timelines, desired outcomes** and work to deliver a more **forward-looking regulatory approach**.

### Future areas for dialogue

- Scope and boundaries. Which regulatory pathways should be treated as the highest priorities for modernization, and which issues fall outside the recommendation.
- Use of pilots. Where pilots would be most useful, what safeguards they would require, and how lessons would be carried into wider reform.
- Appropriate use of outcome-based approaches. Where flexibility would improve performance, and where it would create confusion or risk.
- Capacity and implementation. What resources, expertise, and cross-department coordination would be needed to make modernization credible in practice.

## Recommendation 3: Reform and Renew Programs

The program reform discussion started from a general consensus that current public programs do not consistently help move innovation from proof to adoption and scale. **The draft recommendation going into the workshop leaned toward a simplified value-chain program, more coherent funding across the pathway from proof to adoption, and stronger incentives for private investment in late-stage scaling and commercialization.** That framing served as a useful starting point, but it also raised the question: is the core issue really the number of programs, or is it the lack of coherence across stages, functions, and funding logic?

### What became clearer through the workshop

- There was broad support for judging programs by whether they help move innovation from proof to adoption and scale.
- The discussion reinforced the existence of a persistent missing middle between validated innovation and commercial deployment.
- The recommendation should be framed less as program consolidation for its own sake and more as better pathway design across the route to scale.
- There was support for simplifying fragmented program structures where they slow progress, but also cautioned against collapsing functions that should remain distinct, including foundational research and regional capacity.

- Participants emphasized that innovation in agri-food includes modernization, retooling, adoption of proven technologies, automation, software, and process improvements, not only novel technologies or early-stage R&D.
- The discussion also highlighted the need for stronger conditions to crowd in private investment, especially in later-stage scaling and commercialization, rather than relying on public funding alone.
- Program metrics were seen as stronger when tied to results such as productivity, throughput, adoption, resilience, and value capture, rather than activity alone.

### Recommendation as refined through the workshop

Program design should be judged by whether public support enables innovation to move from proof-of-concept to commercialization, adoption, and scale. Canada continues to generate strong research and innovation activity, but the system does not consistently translate that strength into widespread adoption and economic impact.

A persistent “missing middle” remains between validated innovation and commercial deployment. This reflects gaps in scale-up capital, modernization support, commercialization infrastructure, and adoption incentives. At the same time, current program structures often fragment support across multiple streams, are more concentrated in early-stage activity relative to later-stage needs, and track

activity, with limited and delayed measurement of outcomes such as adoption, scale, and value capture.

Program reform should focus on strengthening continuity across the full innovation pathway, with greater emphasis on later-stage commercialization, modernization, adoption, and scale, while maintaining strong foundational research, regional capacity, and clear public-private roles.

### Priority actions

- **Redesign programs to create a more continuous and outcome-oriented pathway** from research to commercialization, adoption, and scale, reducing fragmentation across funding streams.
- Maintain essential support for **foundational research**, rebalance support toward the **missing middle** with an emphasis on adoption, commercialization infrastructure, and scale-up, and strengthen conditions to crowd in **private investment** through co-investment and stronger alignment between public support and measurable outcomes.

## Conclusion

The work to date has brought greater clarity around where the agri-food innovation is underperforming and what a next-generation system should look like. Being tested through the workshop discussion, the innovation statement is clearer than it was at the outset, and the three recommendations are more specific and more grounded.

A consistent message emerges. Canada's challenge is not invention alone, but system performance across the pathway from proof to scaled use. The discussion also reinforced that these challenges are interconnected across research capacity, infrastructure, commercialization, and adoption. Incremental adjustments will not be sufficient. More fundamental changes in system design, coordination, and performance expectations will be required. The process also made clear that the

- **Embed stronger performance measurement and feedback loops** tied to adoption, scale, productivity, value capture, and commercialization outcomes to support ongoing program design and renewal.

### Future areas for dialogue

- Program boundaries. What should be integrated, and what should remain distinct because it serves a different function or time horizon.
- Public-private balance. How to crowd in private investment without subsidizing low-impact activity or creating dependency.
- Scale-up design. What tools are most appropriate for bridging the missing middle between validated innovation and commercial deployment.
- Measurement and accountability. Which indicators would best show whether programs are improving adoption, scale, and value capture rather than only funding activity.

innovation statement and recommendations needed tighter language, clearer boundaries, and stronger performance anchors if they were to be useful in policy discussion and advocacy.

The next phase is to build broader alignment around the innovation statement and recommendations and encourage uptake across organizations, coalitions, and policy-facing stakeholders. This includes using, testing, and reflecting this language in advocacy, policy development, and stakeholder engagement, while continuing to bring in perspective, challenge, and refinement from practice. There is still a need for further dialogue and convening role, but the output of the initiative has reached the point where wider uptake and stronger buy-in matter as much as further refinement.