



Primary Industries and Bioeconomy

Total investment

\$194m

per year by 2029/30
(from forecast \$292m
in 26/27)

Expected contributions:

- Productive, resilient and sustainable primary production systems
- World-leading biosecurity prevention, preparedness and response
- Technology-enabled, data-driven production systems
- Greater value capture and diversification by enabling high-value products, advanced processing and IP

TfP = Technology for Prosperity

PI&B = Primary Industries and Bioeconomy

ES&R = Environmental Sustainability and Resilience

H&S = Healthy People and a Thriving Society

PIB 1	Medium	Biosecurity surveillance, detection and response
Research enables NZ’s biosecurity systems to detect threats earlier and respond faster to reduce economic, environmental and productivity losses.		
Invest in science that: • Connects surveillance, diagnostics and data systems (w/ TfP). • Improves risk intelligence and early detection of priority and emerging threats. • Develops better decision-support, control and eradication tools to reduce biosecurity impacts (w/ ES&R). Sits within a wider government-led system, including CoRE, BSI, MPI, MCERT and private sector.		
PIB 2	Large	High-value bio-based products, processing and IP
Industry-led science enables a more diversified, innovation-led bioeconomy that converts biological strengths into trusted products and enduring national value.		
Co-invest in industry-led science that: • Develops high-value products and ingredients from bio resources (w/ H&S). • Builds bioprocessing/biomanufacturing capability, retaining more value onshore. • Improves market access, product trust, commercialisation and IP outcomes. Target a small number of sectors for focused investment, selected through RFNZ’s standard assessment processes. Increased focus on industry-led and co-funded research.		
PIB 3	Small	Bio-based value systems build from our unique biological resources
Next-gen bio-based value chains create globally differentiated products and services that build on indigenous knowledge, bio-resources and commercial innovation.		
Invest in science that: • Validates NZ’s unique high-value bioactive products, foods and solutions for global markets. • Enables indigenous innovation, commercialisation pathways and helps grow the Māori innovation economy. Leverages indigenous knowledge systems, capability and resources as a source of competitive advantage to create additional value across other outcome areas.		
PIB 4	Large	Resilient, high-performing and sustainable production systems
By 2031, primary producers will increasingly use science-backed production systems that improve productivity while reducing climate, environmental and biological risks.		
Co-invest in industry-led and transdisciplinary science that: • Accelerates climate-resilient genetic improvement across priority species. • Develop integrated low-impact production systems that perform under changing conditions (w/ ES&R). • Strengthen shared data, measurement and decision-support tools for producers. Government funding refocused on transformational market opportunities, increased industry role for incremental and near-to-market R&D.		



PIB 5	Medium	High-tech enabled production systems
Tech testbeds generate trusted evidence, accelerating adoption of precision agriculture, automation, traceability and resource-efficient technologies.		
Invest in science that: • Tests and validates high-tech production systems in real-world NZ settings. • Supports adoption through tech assessment, demonstration and co-investment. Net increase w/ TfP funding for primary tech development. Funding in PI&B refocused on validation and adoption of tech across other outcomes.		
PIB 6	Small	Critical minerals and low-impact resource development
New Zealand better understands its critical minerals potential, establishes capability in low-impact extraction and processing and addresses adoption barriers and value capture.		
Invest, alongside industry, in science that: • Improves knowledge of critical mineral resources and opportunities. • Enables low-impact exploration, extraction and rehabilitation (w/ ES&R). • Advance processing, recycling and recovery technologies that increase domestic value capture (w/ TfP and ES&R). Focus on scoping opportunity and growing existing capabilities, positioning for future growth.		