

Top 3 States Host 31.4% of U.S. Crop Support Ops

31.4% of U.S. Crop Support Ops in 3 States

California, Texas, and Iowa dominate agtech infrastructure — a concentration with deep systemic implications

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THE DATA

31.4%

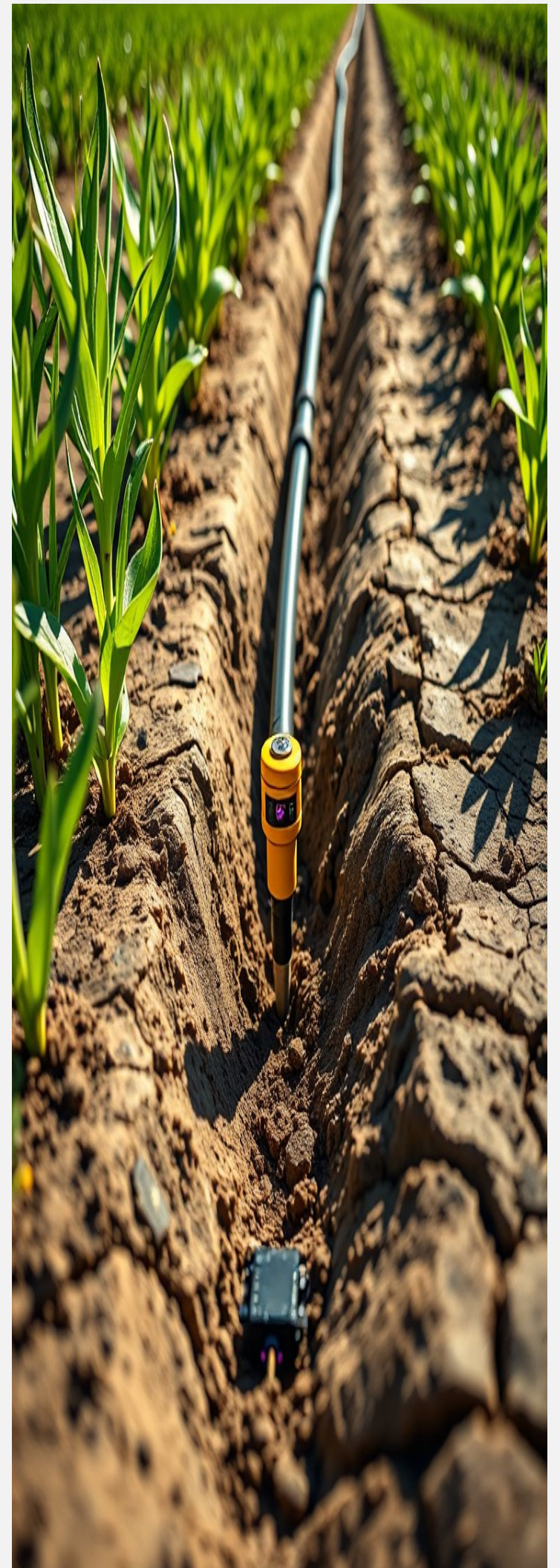
Share of America's Crop Production Support Operations in Its Top Three States (2022)

The top three states—California, Texas, and Iowa—account for over a third of all U.S. crop support operations.

This concentration reveals a structural dependency: the backbone of U.S. agricultural logistics and innovation is not distributed but deeply centralized. The efficiency of this cluster is unmatched, but so is its vulnerability. A single disruption in one of these states—due to climate, policy, or infrastructure failure—could ripple across the entire agtech ecosystem.

Source: U.S. Census Bureau, County Business Patterns 2022, NAICS 1151 (Support activities for crop production) · ALEX Intelligence computation

<https://alex-companies.com/data/2026-09-10-agtech-conc-1151-state>



01

AgTech Resilience Requires Decentralized Innovation

The dominance of California, Texas, and Iowa in crop support infrastructure reflects a historical alignment of climate, capital, and land-grant university research capacity. However, this concentration creates a single point of failure for AI-driven agtech supply chains. The next wave of innovation will not come from scaling the current hubs, but from building resilient, distributed R&D nodes—particularly in states like Nebraska, Minnesota, and Georgia—where support operations are growing but underinvested.



02

Land-Grant Universities Are the Real AgTech Catalysts

The current cluster is not accidental—it is a product of decades of federal investment in land-grant institutions. Texas A&M's TRERC, Iowa State's Agroecology Center, and UC Davis's AgTech Lab are not just researchers; they are the architects of the current system. Yet, the data shows that states with rising support operations—like Nebraska and Minnesota—are now catching up. This suggests that the next breakthroughs in AI for agriculture will emerge not from Silicon Valley, but from university-led labs in the Midwest and South, where real-world data and agronomic feedback loops are most active.

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george@alex.realestate · +1 713.918.9951



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