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Precision Livestock Farming Market by System Type (Milking Robotic Systems, Precision Feeding Systems, Livestock Monitoring Systems), Application, Offering, Farm Type (Dairy, Swine, Poultry), Farm Size and Geography - Global Forecast to 2028

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Abstracts

The precision livestock farming market is estimated to be USD 6.9 billion in 2023 and projected to reach USD 11.2 billion by 2028, at a CAGR of 10.2%. Increasing need for optimization of dairy and poultry farms and the growing demand for livestock products are the primary drivers for the growth of the precision livestock farming market. Furthermore, increase in the number of dairy farms and rise in the adoption of livestock farming products in developing countries are expected to create opportunities for technology providers in this market. On the other hand, high initial investment, and lack of technological awareness among farmers are expected to restrain the growth of the precision livestock farming market during the forecast period.

The market for poultry monitoring and robotic systems to witness highest CAGR during the forecast period

The poultry monitoring and robotic systems segment is expected to witness the highest growth rate during the forecast period. Robotics is still at a nascent stage in poultry farms, with only a few players catering to the poultry segment. However, this segment is expected to grow at a substantial pace in the near future. Companies such as Farm Automation and Robotics SL (Faromatics), Octopus Biosafety, MSD Animal Health, and Tibot have significantly contributed to poultry farm robotics by introducing innovative products. Poultry monitoring and robotic systems have witnessed steady demand over the last few years due to rising labor costs and efforts to improve poultry farm operations. In poultry farms, advanced camera systems and smart sensors are used to

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detect the activity of birds, stress among flocks, and monitor the growth of birds. Robotic systems are also being increasingly used for monitoring purposes that provide farm-related information in real-time to farm operators for better decision-making.

The precision livestock farming software and services market is likely to grow at a higher CAGR between 2023 and 2028

The software and services segment market is expected to grow at the highest CAGR during the forecast period. The technological advancements in software and services used in precision livestock farming management systems are one of the key factors driving the market over the past few years. There is a growing demand for managed and maintenance services owing to the growing demand for livestock farming technology among livestock owners. Precision livestock farming is witnessing accelerated adoption of emerging technologies such as artificial intelligence, machine learning, and the Internet of Things. The connected farming environment has led the farmers to monitor different aspects of the farm and for efficient management. The integration of hardware and software has led to the development of several analytical tools to monitor the health and behavior of animals with a few of them providing suggestions to manage different situations pertaining to animal health.

The market for milk harvesting applications is likely to account for the largest market share from 2023 to 2028

Milk harvesting application is expected to hold the largest market share among all application segments during the forecast period mainly due to rising demand for milking robots on dairy farms from mid-sized to large-sized farms worldwide. Milk harvesting can be done once or twice a day, depending on the animal and the management practices. Proper hygiene and sanitation are crucial during the milking process to prevent the spread of diseases and ensure milk quality. Dairy farmers must also ensure their animals receive good nutrition and care to maintain optimal milk production. Companies such as DeLaval and GEA Group Aktiengesellschaft are launching new milking machines and robots to meet the growing demand for milk and dairy products and help farmers increase their productivity. These new machines and robots may incorporate innovative technologies and features that improve efficiency, milk quality, and animal welfare.

China is expected to account for the largest share of the precision livestock farming market in Asia Pacific between 2023 and 2028.

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Increasing number of dairy cows, the high efficiency of dairy farms, and rising milk production are some of the major factors propelling the growth of the precision livestock farming market in China. The livestock industry in China is organized, and the country has many commercial farms with larger herd sizes. More than 40% of the dairy farms in China have herd size of more than 100 cows, and more than 25% of total farms in China have herd size of more than 500 cows. The country accounts for almost half of the world's pork supply and has huge pig farms in the eastern region. Due to the rapid consolidation of smaller farms in China, the adoption of autonomous livestock technology is expected to increase in the coming years.

The breakup of primaries conducted during the study is depicted below:

By Company Type: Tier 1 – 35 %, Tier 2 – 40%, and Tier 3 –25%

By Designation: C-Level Executives – 57%, Directors – 29%, and Others – 14%

By Region: North America– 30%, South America– 15%, Europe – 20%, APAC – 25%, and RoW – 10%

The major players in the precision livestock farming market are DeLaval (Sweden), Allflex Livestock Intelligence (US), GEA Farm Technology (GEA Group) (Germany), Afimilk (Israel), Lely International (Netherlands), Dairymaster (Ireland), Livestock Improvement Corporation (New Zealand), Fancom (Netherlands), and Fullwood Packo (UK).

Research Coverage

The report segments the precision livestock farming market and forecasts its size, by volume and value, based on region (Americas, Europe, Asia Pacific, and RoW), offering (hardware, software, and services), system type (milking robotic systems, precision feeding systems, livestock monitoring systems, and poultry monitoring and robotic systems), farm type (dairy farms, swine farms, poultry farms, others (equine and bovine farms), farm size (small farms, mid-sized farms, large farms), and application (milk harvesting, feeding management, livestock health and behavior monitoring and others (Calf Management, Genetic Management, Cattle Sorting, Data Analysis, and Financial Management).

The report also comprehensively reviews market drivers, restraints, opportunities, and

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challenges in the precision livestock farming market. The report also covers qualitative aspects in addition to the quantitative aspects of these markets.

Reasons to Buy the Report:

Analysis of key drivers (Implementation of IoT-and AI-enabled devices for livestock monitoring, transition from precision livestock farming to decision livestock farming, surging labor costs and rising demand for automation in livestock industry, growing demand for protein and dairy products, supporting government policies and incentive programs promoting dairy farm mechanization), restraints (High upfront cost and marginal return on investment, lack of technological awareness among livestock farmers, availability of plant-based alternative products for dairy milk), opportunities (increasing adoption of livestock monitoring technology in developing countries, increasing number of dairy, poultry and swine farms, growing popularity of poultry robots and BSC smart cameras), and challenges (global warming and other environmental concerns, emergence & re-emergence of diseases and environmental concerns) influencing the growth of the precision livestock farming market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the precision livestock farming market

Market Development: Comprehensive information about lucrative markets – the report analyses the precision livestock farming market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the precision livestock farming market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like DeLaval (Sweden), Allflex Livestock Intelligence (US), GEA Farm Technology (GEA Group) (Germany), Afimilk (Israel), Lely International (Netherlands), Dairymaster (Ireland), Livestock Improvement Corporation (New Zealand), Fancom (Netherlands), and Fullwood Packo (UK). among others in the precision livestock farming market strategies.

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*Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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