

Livestock Monitoring Market Forecasts to 2034 – Global Analysis By Offering (Hardware, Software, and Services), Livestock Type (Cattle, Poultry, Swine, Sheep & Goats, Equine, and Other Livestock), Farm Size, Deployment Model, Technology, Application, Sector, and By Geography

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Abstracts

According to Statistics MRC, the Global Livestock Monitoring Market is accounted for \$3.7 billion in 2026 and is expected to reach \$12.5 billion by 2034 growing at a CAGR of 16.2% during the forecast period. Livestock monitoring solutions encompass hardware, software, and services that enable farmers to track animal health, location, behavior, and productivity in real-time. These technologies integrate sensors, wearables, GPS devices, and analytics platforms to optimize herd management, detect diseases early, and improve operational efficiency. The market addresses the growing demand for protein production while ensuring animal welfare and sustainable farming practices across global agricultural operations.

Market Dynamics:

Driver:

Rising global demand for animal protein

Expanding global population and increasing middle-class consumption in emerging economies are intensifying pressure on livestock producers to maximize productivity. Farmers must optimize herd health, reproduction rates, and feed efficiency to meet protein demand while managing shrinking agricultural land resources. Monitoring

technologies enable data-driven decisions that improve yields and reduce losses through early illness detection and optimized breeding cycles. This productivity imperative drives adoption of sensors, wearables, and management software across all livestock segments, transforming traditional farming into precision agriculture operations.

Restraint:

High initial investment and infrastructure requirements

Substantial upfront costs for monitoring hardware, software platforms, and connectivity infrastructure create adoption barriers for small and medium-sized farms. Comprehensive systems require sensors per animal, gateways, data storage, and integration with existing farm management practices. Limited internet connectivity in rural agricultural regions further constrains real-time monitoring capabilities. Smallholder farmers, representing significant portions of global livestock production, struggle to justify investments without clear short-term returns, slowing market penetration despite long-term efficiency benefits.

Opportunity:

Integration of AI and predictive analytics

Advanced artificial intelligence platforms are transforming livestock monitoring from reactive observation to predictive health management. Machine learning algorithms analyze historical and real-time data to forecast disease outbreaks, optimal insemination windows, and potential lameness issues before clinical symptoms appear. These predictive capabilities dramatically reduce veterinary costs and mortality rates while improving overall herd productivity. As algorithms improve through accumulated farm data, accuracy increases, creating compelling value propositions that accelerate adoption across commercial farming operations seeking competitive advantages through technology.

Threat:

Data ownership and privacy concerns

Uncertainty regarding ownership and control of animal-generated data creates tension between farmers, technology providers, and downstream supply chain partners. Farm

data represents significant commercial value for breeding insights, pharmaceutical targeting, and supply chain optimization. Farmers fear exploitation through opaque data usage terms that benefit technology companies or processors without fair compensation. Regulatory frameworks lag behind technological capabilities, creating legal uncertainties that discourage adoption among privacy-conscious operators who recognize data as a valuable farm asset requiring protection.

Covid-19 Impact:

The COVID-19 pandemic highlighted vulnerabilities in global food supply chains, accelerating interest in livestock monitoring technologies. Processing plant closures and labor shortages demonstrated risks of concentrated production, driving interest in efficiency-enhancing automation. Meat packers implemented enhanced traceability requirements, pushing monitoring adoption upstream to farms. Consumer attention on food security and ethical production intensified during lockdowns, creating market advantages for producers demonstrating transparent, technology-enabled animal management practices. These shifts established lasting momentum for monitoring adoption beyond pre-pandemic levels.

The Hardware segment is expected to be the largest during the forecast period

The Hardware segment is expected to account for the largest market share during the forecast period, encompassing essential physical components including sensors, RFID tags, smart ear tags, collars, wearables, GPS devices, cameras, and drones. These foundational elements collect critical animal data on location, health metrics, feeding patterns, and behavioral changes. Hardware represents the initial investment layer required before software and services deliver value, ensuring sustained revenue through replacement cycles and farm expansions. Continuous innovation in miniaturization, battery life, and durability drives ongoing hardware upgrades across global livestock operations.

The Poultry segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Poultry segment is predicted to witness the highest growth rate, driven by short production cycles, high stocking densities, and significant disease outbreak risks. Poultry operations benefit immensely from automated monitoring of environmental conditions, feed consumption, and early mortality detection. Rapid genetic improvement in broilers and layers requires precise management to realize genetic potential, creating strong technology adoption incentives. The segment's

industrialization in emerging markets, combined with export requirements for traceability, accelerates monitoring deployment across large-scale poultry integrators worldwide.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by large-scale commercial farming operations, early technology adoption, and robust veterinary infrastructure. The region's cattle feedlots and poultry integrators operate at scales where monitoring efficiencies deliver measurable returns. Strong venture capital investment in agtech startups drives continuous innovation. Government programs supporting agricultural digitization and export certification requirements for traceability further accelerate adoption. Established presence of major monitoring technology providers headquartered in the region reinforces North American market leadership throughout the forecast period.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapidly expanding livestock populations and modernization of traditional farming practices. China's massive pork industry recovery from African swine fever drives intensive monitoring adoption for disease prevention. India's growing dairy sector seeks efficiency improvements through cattle monitoring technologies. Australia and New Zealand's export-focused sheep and cattle operations adopt advanced traceability systems for international market access. Government initiatives supporting agricultural technology adoption across the region accelerate monitoring deployment, establishing Asia Pacific as the fastest-growing livestock monitoring market.

Key players in the market

Some of the key players in Livestock Monitoring Market include Allflex Livestock Intelligence, Merck Animal Health, Zoetis Inc., DeLaval Inc., GEA Group Aktiengesellschaft, Lely Holding S.? r.l., BouMatic LLC, SCR Dairy, Afimilk Ltd., Fancom B.V., Nedap N.V., CowManager B.V., Moocall Ltd., Smartbow GmbH, and HerdInsights.

Key Developments:

In August 2025, DeLaval launched the Milk Meter MM100, a high-precision sensor for

conventional milking systems designed to provide real-time production data and health insights to enhance milking efficiency.

In June 2025, Nedap launched SmartSight, an AI-driven computer vision system designed to detect lameness in dairy cows. This marked the company's first major step into integrating vision technology with its existing wearable sensor platform.

Offerings Covered:

Hardware

Software

Services

Livestock Types Covered:

Cattle

Poultry

Swine

Sheep & Goats

Equine

Other Livestock

Farm Sizes Covered:

Small Farms

Medium Farms

Large Farms

Deployment Models Covered:

On-Premise

Cloud-Based

Hybrid Deployment

Technologies Covered:

IoT-Based Monitoring

AI & Machine Learning

Computer Vision

RFID & NFC

GPS & GNSS Tracking

Blockchain for Traceability

Edge Computing

Applications Covered:

Health Monitoring

Milk Harvesting / Milking Management

Feeding Management

Breeding & Reproduction Monitoring

Heat Detection & Estrus Monitoring

Behavior Monitoring

Heat Stress Monitoring

Sorting & Weighing Management

Animal Comfort Monitoring

Other Applications

Sectors Covered:

Dairy Farming

Meat Production

Breeding Farms

Mixed Livestock Farms

Other Sectors

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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