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Manure Handling Equipment Market Forecasts to 2032 – Global Analysis By Equipment Type (Manure Spreaders, Agitators/Mixers, Manure Separators, Manure Pumps, Barn Cleaners/Scrapers, Compost Turners and Other Equipment Types), Manure Form Handled (Solid Manure Handling and Liquid Manure Handling), Manure Storage Systems, Power Source, Operation Type, Mobility, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Manure Handling Equipment Market is accounted for $875.7 million in 2025 and is expected to reach $1207.7 million by 2032 growing at a CAGR of 4.7% during the forecast period. Manure handling equipment refers to specialized machinery that effectively collects, processes, stores, and applies livestock waste. These tools, which are made to handle both solid and liquid manure, include compost turners, pumps, agitators, separators, and manure spreaders. By efficiently recycling organic waste into agricultural fields, it contributes to improving soil fertility, lowering labor costs, preserving farm hygiene, and minimizing environmental impact.

According to data from the U.S. Environmental Protection Agency's AgSTAR, as of June 2024, there are 400 operational manure-based anaerobic digestion systems in the U.S.

Market Dynamics:

Driver:

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Growth in livestock farming

The robust expansion of livestock farming globally is a primary driver for the market. As demand for animal products rises, farms are scaling up operations, resulting in the generation of larger volumes of manure that require efficient management. This trend compels farmers to invest in advanced equipment to ensure effective waste handling, prevent environmental contamination, and optimize manure for use as fertilizer or renewable energy. Furthermore, the growth of the livestock sector in emerging economies amplifies the need for modern manure management solutions, thereby fueling market demand.

Restraint:

Lack of infrastructure in developing regions

Many farmers in developing regions face challenges such as limited access to modern machinery, insufficient technical expertise, and unreliable maintenance services. The complexity and high initial cost of advanced manure handling systems further exacerbate adoption barriers. Additionally, fragmented supply chains and weak financial support hinder the widespread implementation of efficient manure management practices, ultimately slowing market growth in these regions.

Opportunity:

Increasing adoption of biogas and composting systems

The rising adoption of biogas and composting systems presents a substantial opportunity for the market. As sustainability and renewable energy gain prominence, farmers are increasingly leveraging manure as a resource for biogas production and high-quality compost. This shift not only provides an alternative revenue stream but also aligns with environmental regulations and circular agriculture principles. Moreover, government incentives and technological advancements in waste-to-energy solutions are encouraging the integration of manure handling equipment with biogas and composting infrastructure, driving market expansion.

Threat:

Volatility in raw material prices

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Fluctuations in the cost of steel, plastics, and electronic components can significantly impact manufacturing expenses, leading to increased equipment prices. This unpredictability creates challenges for both manufacturers and end-users, potentially delaying investment decisions and constraining profit margins. Additionally, supply chain disruptions and global trade uncertainties further heighten the risk associated with raw material sourcing, affecting the overall stability and growth prospects of the market.

Covid-19 Impact:

The Covid-19 pandemic had a mixed impact on the manure handling equipment market. Initially, disruptions in the global supply chain and labor shortages led to delays in equipment manufacturing and installation. Many farmers postponed capital expenditures due to economic uncertainty. However, the pandemic also underscored the importance of automation and efficient waste management, prompting renewed interest in advanced manure handling solutions as restrictions eased. As a result, the market gradually recovered, with increased emphasis on resilient and sustainable agricultural practices.

The manure spreaders segment is expected to be the largest during the forecast period

The manure spreaders segment is expected to account for the largest market share during the forecast period, attributed to the critical role spreaders play in efficiently distributing manure across fields, enhancing soil fertility, and supporting sustainable farming practices. Technological advancements, such as GPS-guided applications and automated controls, have improved precision and minimized nutrient loss, making spreaders indispensable for both large#- #and small-scale farms. Additionally, the growing emphasis on organic farming and environmental compliance further boosts demand for advanced manure spreaders.

The above-ground tank storage systems segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the above-ground tank storage systems segment is predicted to witness the highest growth rate, driven by the increasing need for secure, scalable, and environmentally compliant manure storage solutions. Above-ground tanks offer flexibility, ease of installation, and enhanced monitoring capabilities, making them ideal for modern livestock operations and biogas projects. Furthermore, advancements in materials, corrosion resistance, and integration with IoT-based monitoring systems are

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propelling the adoption of above-ground storage, supporting the segment’s rapid expansion.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. This leadership is underpinned by the region’s advanced agricultural sector, widespread adoption of modern livestock farming practices, and stringent environmental regulations. The United States and Canada, in particular, are investing heavily in upgrading manure management infrastructure to comply with sustainability standards and boost productivity. Additionally, robust government support, access to cutting-edge technology, and a strong focus on environmental stewardship contribute to North America’s dominant position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Rapid urbanization, population growth, and the expansion of livestock farming are key factors driving this accelerated growth. Countries such as China, India, and Southeast Asian nations are witnessing increased investments in modern agricultural equipment, supported by government incentives and rising awareness of sustainable farming. Moreover, the region’s focus on food security and environmental protection is prompting farmers to adopt advanced manure handling solutions, positioning Asia Pacific as the fastest-growing market.

Key players in the market

Some of the key players in Manure Handling Equipment Market include GEA Group AG, Bauer Group, Bazooka Farmstar, BouMatic, Cadman Power Equipment, Daritech Inc., Lely, Patz Corporation, Phil's Pumping & Fabrication, Valmetal Inc., CNH Industrial N.V. (Case IH & New Holland), Deere & Company (John Deere), JOSKIN S.A., Jamesway Farm Equipment, Nuhn Industries Ltd., Doda USA Inc., McLanahan Corporation, and SlurryKat Ltd.

Key Developments:

In September 2024, Lely launched the 'sand flush,' an accessory for their Discovery Collector manure robots, enabling effective manure collection in barns with sand bedding—a common challenge in dairy farming.

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In June 2024, Bazooka Farmstar introduced the 32’ Outlaw force-feed trailer, a compact and efficient manure handling solution featuring a high-flow boom and compatibility with their Nexus electronic pump control technology.

In June 2023, CNH Industrial initiated the 'Sustainable Environment Solution' program in Chhattisgarh, India, focusing on crop residue management to prevent stubble burning. The program includes training for farmers on utilizing crop residues for purposes such as compost manure, thereby promoting sustainable agricultural practices.

Equipment Types Covered:

- Manure Spreaders
- Agitators/Mixers
- Manure Separators
- Manure Pumps
- Barn Cleaners/Scrapers
- Compost Turners
- Other Equipment Types

Manure Form Handlings Covered:

- Solid Manure Handling
- Liquid Manure Handling

Manure Storage Systems Covered:

- Lagoon Storage Systems
- Above-Ground Tank Storage Systems

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Pit Storage Systems

Dry Stack Storage Systems

Power Sources Covered:

Hydraulic

Electric

PTO-driven (Power Take-Off)

Mechanical

Operation Types Covered:

Automatic

Semi-Automatic

Manual

Mobility’s Covered:

Stationary Equipment

Portable Equipment

End Users Covered:

Dairy Farms

Poultry Farms

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- Swine Farms
- Beef Cattle Farms
- Equine Farms
- Biogas Plants/Energy Producers
- Commercial Composting Facilities
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific

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- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar
- South Africa
- Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments

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- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- 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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Contents

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13 KEY DEVELOPMENTS

14 COMPANY PROFILING

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List Of Tables

LIST OF TABLES

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Table 38 Global Manure Handling Equipment Market Outlook, By Other End Users (2024-2032) ($MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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