

## **Livestock Monitoring - Company Evaluation Report, 2025**

Market Report | 2025-08-01 | 125 pages | MarketsandMarkets

### **AVAILABLE LICENSES:**

- Single User \$2650.00
- Corporate License \$4250.00

### **Report description:**

The Livestock Monitoring Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for Livestock Monitoring. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and industry trends. MarketsandMarkets 360 Quadrants evaluated over 62 companies, of which the Top 8 Livestock Monitoring Companies were categorized and recognized as quadrant leaders.

Livestock monitoring utilizes technology to continuously track the health, location, and behaviour of farm animals such as cattle, sheep, and swine. This is achieved through a network of connected devices, including sensor-equipped ear tags, smart collars, and ingestible boluses, which collect real-time data on vital signs like body temperature, activity levels, and rumination patterns. This data is transmitted to a central software platform, often powered by AI, which analyzes it to provide farmers with actionable insights for proactive management, turning raw data into valuable information for precision agriculture.

The primary driver for the livestock monitoring market is the growing global demand for meat and dairy products, which requires farmers to enhance productivity and operational efficiency. The technology enables early detection of illness, often before visible symptoms appear, reducing treatment costs and preventing herd outbreaks. It also helps optimize breeding cycles through heat detection and automates location tracking to prevent theft and aid in pasture management. A growing consumer demand for food traceability and higher animal welfare standards is also pushing farmers to adopt these transparent, data-driven systems.

Despite the benefits, several barriers hinder widespread adoption. The significant upfront investment in sensors, gateways, and software can be prohibitive for many small and medium-sized farms. Ensuring the durability and reliability of electronic sensors in the harsh conditions of a farm environment is an ongoing technical challenge. Furthermore, a lack of consistent and robust internet connectivity in many rural areas can disrupt the real-time data flow that is crucial for the system's effectiveness. Farmers may also require training and support to learn how to interpret the data and integrate it into their daily operations.

The 360 Quadrant maps the Livestock Monitoring companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the Livestock Monitoring quadrant. The top criteria for product footprint evaluation included Application [Milk Harvesting Management, Heat Detection Monitoring, Feeding Management, Heat Stress Management, Health Monitoring Management, Sorting & Weighing Management], Livestock Type [Cattle, Poultry, Swine, Equine, Others], Farm Size [Small Farms, Medium-sized Farms, Large Farms], Offering [Hardware, Software, Services].

#### **Key Players:**

Major vendors in the Livestock Monitoring market are Merck & Co., Inc. (US), GEA Group (Germany), DeLaval (Sweden), Nedap N.V. (Netherlands), and Afimilk Ltd. (Israel). The key strategies major vendors implement in the Livestock Monitoring market are

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

partnerships, collaborations, product launches, and product enhancements.

Merck & Co., Inc.

Merck & Co., Inc. (known as MSD globally) is a premier biopharmaceutical company with a formidable presence in oncology and vaccines. Its growth is largely driven by the cancer immunotherapy powerhouse KEYTRUDA and its HPV vaccine, GARDASIL. Strategically, Merck is focused on expanding its oncology leadership and robust vaccine portfolio while actively pursuing business development to strengthen its future pipeline. The company also maintains a significant Animal Health division, providing a diverse range of veterinary medicines and services, underscoring its broad impact on both human and animal well-being worldwide.

GEA Group

GEA Group is a global leader in process technology and engineering, primarily for the food, beverage, and pharmaceutical industries. The German-based company provides everything from individual machines like separators and homogenizers to complete, integrated processing lines. GEA's strategy is centered on enabling sustainable and efficient production, offering solutions that reduce energy consumption and enhance food safety. By focusing on digitalization, expanding its pharma services, and supporting the growth of "new food" alternatives, GEA solidifies its position as a critical technology partner for life's essential industries worldwide.

DeLaval

DeLaval is a global leader in the dairy farming industry, providing integrated solutions that cover every aspect of milk production. The Swedish company's portfolio ranges from traditional milking parlors to its advanced VMS robotic milking systems. DeLaval's core strategy is to drive the automation and digitalization of dairy farms, using its DelPro software platform to provide farmers with crucial data on herd health and productivity. By focusing on robotic technology, data-driven insights, and sustainable farming practices, DeLaval is cementing its role as a key partner for modern dairy producers worldwide.

## Table of Contents:

1	INTRODUCTION	11
1.1	MARKET DEFINITION	11
1.2	STAKEHOLDERS	11
2	EXECUTIVE SUMMARY	12
3	MARKET OVERVIEW	16
3.1	INTRODUCTION	16
3.2	MARKET DYNAMICS	16
3.2.1	DRIVERS	17
3.2.1.1	Growth in meat production	17
3.2.1.2	Increasing focus on real-time monitoring and early disease detection	18
3.2.1.3	Integration of AI and IoT	19
3.2.2	RESTRAINTS	20
3.2.2.1	High initial cost of implementation	20
3.2.2.2	Limited awareness and technology adoption in developing regions	21
3.2.3	OPPORTUNITIES	22
3.2.3.1	Increasing use of smart wearables for livestock	22
3.2.3.2	Growing focus on reproductive monitoring and breeding optimization	23
3.2.3.3	Integration of blockchain technology	24
3.2.3.4	Rising demand for organic and sustainable livestock practices	25
3.2.4	CHALLENGES	26
3.2.4.1	Managing large volumes of data generated from multiple monitoring devices	26
3.2.4.2	Concerns about environmental impacts associated with livestock farming	27
3.2.4.3	Trade barriers and government regulations	28

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

3.3	VALUE CHAIN ANALYSIS	29
3.4	ECOSYSTEM ANALYSIS	32
3.5	TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS	33
3.6	TECHNOLOGY ANALYSIS	35
3.6.1	KEY TECHNOLOGIES	35
3.6.1.1	Camera-based systems	35
3.6.1.2	Automated sorting systems	35
3.6.2	COMPLEMENTARY TECHNOLOGIES	35
3.6.2.1	AI and blockchain	35
3.6.2.2	Agriculture drones	36
3.6.3	ADJACENT TECHNOLOGIES	36
3.6.3.1	Body condition scoring (BCS) systems	36
3.7	PORTER'S FIVE FORCES ANALYSIS	37
3.7.1	THREAT OF NEW ENTRANTS	38
3.7.2	THREAT OF SUBSTITUTES	38
3.7.3	BARGAINING POWER OF SUPPLIERS	39
3.7.4	BARGAINING POWER OF BUYERS	39
3.7.5	INTENSITY OF COMPETITIVE RIVALRY	39
3.8	PATENT ANALYSIS	40
3.9	IMPACT OF AI/GEN AI ON LIVESTOCK MONITORING MARKET	42
4	COMPETITIVE LANDSCAPE	44
4.1	OVERVIEW	44
4.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, 2020-2025	44
4.3	MARKET SHARE ANALYSIS, 2024	46
4.4	REVENUE ANALYSIS, 2020-2023	48
4.5	COMPANY VALUATION AND FINANCIAL METRICS, 2025	48
4.6	BRAND/PRODUCT COMPARISON	49
4.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	51
4.7.1	STARS	51
4.7.2	EMERGING LEADERS	51
4.7.3	PERVASIVE PLAYERS	51
4.7.4	PARTICIPANTS	51
4.7.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	53
4.7.5.1	Company footprint	53
4.7.5.2	Region footprint	54
4.7.5.3	Offering footprint	55
4.7.5.4	Farm size footprint	56
4.7.5.5	Livestock type footprint	57
4.7.5.6	Application footprint	58
4.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	59
4.8.1	PROGRESSIVE COMPANIES	59
4.8.2	RESPONSIVE COMPANIES	59
4.8.3	DYNAMIC COMPANIES	59
4.8.4	STARTING BLOCKS	59
4.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023	61
4.8.5.1	Detailed list of startups/SMEs	61
4.8.5.2	Competitive benchmarking of key startups/SMEs	61

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.9	COMPETITIVE SCENARIO	62
4.9.1	PRODUCT LAUNCHES	62
4.9.2	DEALS	63
4.9.3	EXPANSIONS	64
4.9.4	OTHER DEVELOPMENTS	65
5	COMPANY PROFILES	66
5.1	INTRODUCTION	66
5.2	KEY PLAYERS	66
5.2.1	MERCK & CO., INC.	66
5.2.1.1	Business overview	66
5.2.1.2	Products/Solutions/Services offered	68
5.2.1.3	Recent developments	70
5.2.1.3.1	Product launches	70
5.2.1.3.2	Deals	71
5.2.1.3.3	Expansions	71
5.2.1.3.4	Other developments	72
5.2.1.4	MnM view	72
5.2.1.4.1	Key strengths	72
5.2.1.4.2	Strategic choices	72
5.2.1.4.3	Weaknesses and competitive threats	72
5.2.2	GEA GROUP	73
5.2.2.1	Business overview	73
5.2.2.2	Products/Solutions/Services offered	74
5.2.2.3	Recent developments	75
5.2.2.3.1	Product launches	75
5.2.2.3.2	Deals	76
5.2.2.4	MnM view	76
5.2.2.4.1	Key strengths	76
5.2.2.4.2	Strategic choices	77
5.2.2.4.3	Weaknesses and competitive threats	77
5.2.3	DELAVAL	78
5.2.3.1	Business overview	78
5.2.3.2	Products/Solutions/Services offered	79
5.2.3.3	Recent developments	81
5.2.3.3.1	Deals	81
5.2.3.4	MnM view	81
5.2.3.4.1	Key strengths	81
5.2.3.4.2	Strategic choices	81
5.2.3.4.3	Weaknesses and competitive threats	81
5.2.4	NEDAP N.V.	82
5.2.4.1	Business overview	82
5.2.4.2	Products/Solutions/Services offered	83
5.2.4.3	Recent developments	85
5.2.4.3.1	Product launches	85
5.2.4.3.2	Deals	85
5.2.4.3.3	Other developments	87
?		

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.2.4.4	MnM view	87
5.2.4.4.1	Key strengths	87
5.2.4.4.2	Strategic choices	87
5.2.4.4.3	Weaknesses and competitive threats	87
5.2.5	AFIMILK LTD.	88
5.2.5.1	Business overview	88
5.2.5.2	Products/Solutions/Services offered	88
5.2.5.3	Recent developments	90
5.2.5.3.1	Product launches	90
5.2.5.3.2	Deals	91
5.2.5.4	MnM view	91
5.2.5.4.1	Key strengths	91
5.2.5.4.2	Strategic choices	91
5.2.5.4.3	Weaknesses and competitive threats	91
5.2.6	DATAMARS	92
5.2.6.1	Business overview	92
5.2.6.2	Products/Solutions/Services offered	92
5.2.6.3	Recent developments	93
5.2.6.3.1	Deals	93
5.2.7	BOUMATIC	94
5.2.7.1	Business overview	94
5.2.7.2	Products/Solutions/Services offered	94
5.2.7.3	Recent developments	96
5.2.7.3.1	Product launches	96
5.2.7.3.2	Deals	96
5.2.8	ENGS SYSTEMS	97
5.2.8.1	Business overview	97
5.2.8.2	Products/Solutions/Services offered	97
5.2.9	COWMANAGER	99
5.2.9.1	Business overview	99
5.2.9.2	Products/Solutions/Services offered	100
5.2.9.3	Recent developments	101
5.2.9.3.1	Product launches	101
5.2.9.3.2	Deals	102
5.2.10	DAIRYMASTER	103
5.2.10.1	Business overview	103
5.2.10.2	Products/solutions/services offered	103
5.3	OTHER PLAYERS	105
5.3.1	SMAXTEC ANIMAL CARE GMBH	105
5.3.2	FULLWOOD JOZ	106
5.3.3	WAIKATO MILKING SYSTEMS NZ LP.	107
5.3.4	FARMBRITE	108
5.3.5	EVER.AG	109
5.3.6	HOKOFARM GROUP	110
5.3.7	MOOCALL	111
5.3.8	VAS	112
5.3.9	SERKET	113

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.10 SENSAPHONE 114
- 5.3.11 PEACOCK TECHNOLOGY LTD. 115
- 5.3.12 COWLAR 116
- 5.3.13 STELLAPPS 117
- 5.3.14 CONNECTERRA 117
- 5.3.15 GALLAGHER GROUP LIMITED 118
- 6 APPENDIX 119
- 6.1 RESEARCH METHODOLOGY 119
  - 6.1.1 RESEARCH DATA 119
    - 6.1.1.1 Secondary data 119
    - 6.1.1.2 Primary data 120
  - 6.1.2 RESEARCH ASSUMPTIONS 121
  - 6.1.3 RESEARCH LIMITATIONS 121
  - 6.1.4 RISK ASSESSMENT 121
- 6.2 COMPANY EVALUATION MATRIX: METHODOLOGY 122
- 6.3 AUTHOR DETAILS 125

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Livestock Monitoring - Company Evaluation Report, 2025**

Market Report | 2025-08-01 | 125 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scottss-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$2650.00
	Corporate License	\$4250.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scottss-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-10"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scottss-international.com

www.scottss-international.com