

Computer Vision Livestock Health Monitoring

ANMD-MRS11-108 · AI & Digital Agriculture Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Computer-vision livestock health monitoring brings AI eyes to the barn and pasture — the cattle, poultry, swine and aquaculture vision systems that track animal health, behaviour, welfare and productivity continuously and contactlessly. This decision-grade study sizes the global market three ways — value, animals/operations monitored and units/subscriptions — across species platform, monitoring focus and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Livestock vision supports animal welfare, antibiotic reduction, resource efficiency and traceable, responsible production.

Mapped Sustainable Development Goals:

SDG 2 Zero Hunger	SDG 8 Decent Work & Economic Growth	SDG 12 Responsible Consumption	SDG 13 Climate Action	SDG 15 Life on Land
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Measurable sustainability outcomes assessed:

- Improved animal welfare and early intervention
- Antibiotic reduction and traceability
- Resource efficiency and productivity
- Welfare-data governance, device footprint and smaller-producer access as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America and large processors lead; Europe drives dairy and welfare vision; specialists broaden species coverage; other regions assessed on their own merits.

MARKET OVERVIEW

From periodic checks to continuous AI oversight — where contactless vision scales welfare and productivity.

Livestock vision is scaling with welfare and productivity demands. Demand is driven by labour scarcity, animal-welfare expectations, disease-cost control and antibiotic-reduction goals — with multi-species platforms and recurring analytics central to value. The market is read three ways — value, animals/operations monitored and units/subscriptions — and forecast under four scenarios, each region reported separately.

- **North America and large processors lead** — United States, across dairy, swine and poultry
- **Europe drives dairy and welfare vision** — the Netherlands, Spain and Austria, on welfare and dairy systems
- **Specialists broaden species coverage** — across cattle, poultry and aquaculture
- **Contactless, continuous monitoring is the differentiator** — camera-based health and behaviour tracking scales without animal-mounted devices

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Processor-led leader	United States — dairy, swine & poultry vision
Europe	Dairy & welfare vision	Netherlands, Spain, Austria — welfare & dairy
Asia Pacific	Scaling	Australia, China — intensive-livestock vision
Latin America	Emerging	Brazil — cattle & poultry monitoring
Africa	Frontier	South Africa — livestock-health pilots
Middle East	Emerging	Israel, UAE — intensive & aquaculture vision

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Labour scarcity in animal operations • Animal-welfare & disease-cost pressure • Antibiotic-reduction & traceability goals • Camera & edge-AI cost decline • Productivity & yield optimisation	• Barn/pasture conditions & camera placement • Accuracy across breeds & species • Integration with farm & vet systems • ROI proof & adoption • Data ownership & welfare-data sensitivity

SEGMENTATION SNAPSHOT

By Species Platform	Cattle vision · poultry vision · swine vision · aquaculture vision · multi-species platforms
By Monitoring Focus	Health / disease · behaviour / welfare · productivity / counting
By Application	Row crops · specialty / horticulture · livestock
By End User	Farmers · agribusiness · co-operatives · agronomists
By Setting	Indoor / barn · pasture · aquaculture
By Business Model	Hardware sales · SaaS subscription · services

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Computer Vision Livestock Health Monitoring
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
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- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
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- › Chapter 34. Circular Economy and Resource-Security Intelligence
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Part VII — Supply Chain, Policy, Legal, Economics and Finance

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- › Chapter 38. Policy, Regulation and Incentive Intelligence
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- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans agri-food majors, animal-health firms and livestock-vision specialists. Deal activity — animal-health acquisitions, processor partnerships and vision-startup deals — signals a market consolidating around multi-species, welfare-and-productivity platforms.

Representative players profiled in the full report:

Cargill, Incorporated · Connecterra B.V. · Merck Animal Health (Allflex) · CattleEye Ltd. · Ever.Ag · Nedap N.V. · Zoetis Inc. (Smartbow) · and 20+ further profiled players across agri-food majors and vision specialists.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global livestock-vision market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How does contactless monitoring change value versus animal-mounted devices?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, animal welfare and data-governance expectations?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Investors, growers, agribusiness, co-operatives, OEMs, retailers, lenders and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.