



Independent Dairy Specialists

DAIRY COSTINGS FOCUS

ANNUAL REPORT 2020

- PRODUCTION SYSTEMS
- MILK PRICE & INPUT COSTS ANALYSIS
- MILK FROM FORAGE ANALYSIS
- REGIONAL ANALYSIS
- MILK YIELD & HERD SIZE BANDS
- HEALTH & FERTILITY TRENDS
- ANTIMICROBIAL ANALYSIS
- ORGANIC & CHANNEL ISLAND UPDATES



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WELCOME

Working with farmers for almost 30 years, Kingshay has built up a comprehensive independent advice network to help drive efficiencies across the dairy industry and secure its profitability for the future.

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It is more important than ever for producers to maximise efficiencies amid the indeterminate effects of Brexit and the COVID-19 pandemic. The team at Kingshay have continued business as usual while mainly working from home, but this has not limited our contact with farmer clients. Instead we have embraced technology to maintain communications, reinforcing that access to innovations and advancements will be key to the industry's future.

Using data effectively is vital to pushing efficiencies and at Kingshay we practice what we preach. The state-of-the-art **South West Dairy Development Centre** (with funding from Agri-EPI Centre), now in its second year, is targeted at researching and trialling the latest technology as well as implementing changes to the herd to determine results that can be passed onto farmers.

Dairy Manager is central to producers being able to implement positive change. Alongside **Profit Manager**, **Health Manager** and **Antimicrobial Reporting**, farmers can use **Dairy Insight** to combine data and technical information to make informed decisions.

In the ninth annual Dairy Costings Focus Report producers can take stock of what changes the past 10 years have brought about and obtain insights to set them up for the next 10 years.

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The Kingshay Team

INTRODUCTION

Data is a great resource for farmers, but if unused or historical then it loses its value. Providing an in-depth analysis of data trends, the **Dairy Costings Focus Report** enables producers to compare across a range of key performance indicators, giving them the tools to tweak their management, alter their focus or invest to get the most from their systems.

This year the report includes a comparison of production systems across both conventional and organic herds (see page 6). This is especially useful for benchmarking as it could highlight where changes can be made; potentially making the difference between loss and profit.

It has been a fairly stable year, with the milk price largely staying firm and the average only varying by 1.67p/litre throughout the year. However, producers should keep a close eye on the market as pressures widened the gap between the lowest and highest paid milk contracts to 9.1p/litre.

Focusing on performance from

forage could offer a way for farmers to protect against lower milk prices or varying input costs. The difference between milk produced from forage is staggering, with the top quartile of forage focused farmers producing 48.6% from forage, while the bottom quartile only averaged 15.4%. This directly correlates to margins over purchased feed, meaning many producers could add to their bottom line by improving their forage management and utilisation.

Producers have evidently been paying close attention to herd health (see page 18), with incidences of mastitis at their lowest in the past five years at 36 cases per 100 cows, while culling for Johne's was up 2.1 percentage points on last year to account for 7.7% of culls.

Irrespective of system type, all dairy farms can be efficient and profitable by making best use of the resources at hand. Having clear and simple systems with obvious goals is key; whether this is making the most of grazing or pushing cows for yield.

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TRENDS OVER THE PAST 10 YEARS

Following 18 years of increasing herd size, the number of cows in the average conventional Holstein/Friesian herd has dropped for the second year in a row.

Herd size peaked at 210 cows in 2017, easing back to 205 in 2019 (following the dry summer of 2018 and forage availability uncertainties), and to 200 by March 2020. Culling rates persisted at a high of 29% with cull cow prices remaining strong. Some producers may have been able to maintain production with fewer cow numbers. Whilst other producers have split units and opted to run two herds rather than a single larger one. Even so, herd size has still increased by 24.2% in the past 10 years.

Average yields per cow have increased, up 8.6% on 2010 to 8,384 litres, while both yield from forage and concentrate use have also risen, up 18.4% and 10.4% respectively, to 2,759 litres/cow and 2,642kg/cow. The increase in yield from forage is particularly notable

as it is nearly back up to pre-2012/13 levels when wet conditions and summer flooding had a big impact on forage/grazing availability, pushing producers towards buying in feed as a means to support yields, as herds had to be housed in July/August in some areas of the UK.

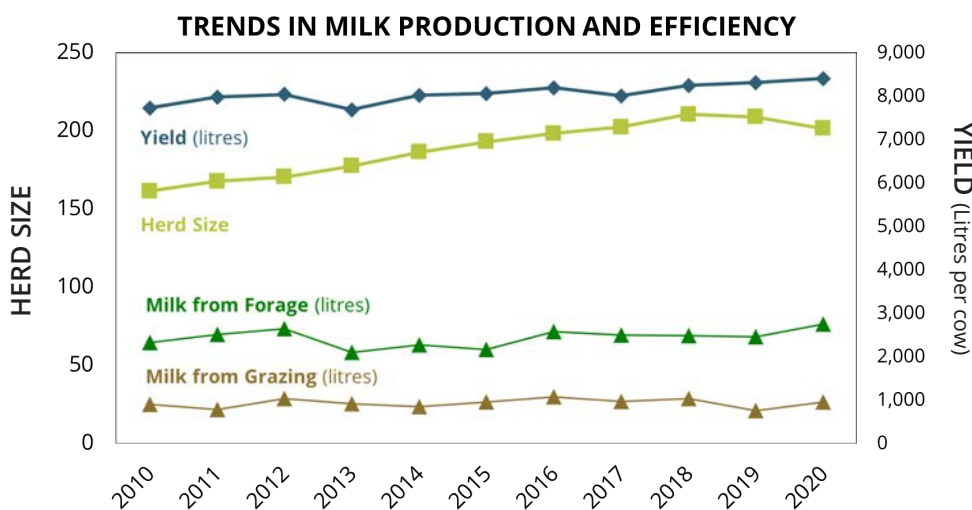
Over the past 10 years the average milk price has fluctuated, but prices averaged 28.44p/litre for the year ending March 2020; when combined with higher yields the total milk value per cow rose by 28.2%, to £2,385 per cow. However, the price of concentrates has jumped by 29.3% over the same period, to £238/t, meaning the milk price to concentrate ratio has dropped by 8.6% to 1.20.

ANNUAL ROLLING RESULTS						
Holstein/Friesian, Conventional Herds		Year Ending Mar 2010	Year Ending Mar 2020	Difference	% Change	
Cows in herd		161	200	39	24.2%	
Stocking rate cows/ha		2.21	2.28	0.07	3.2%	
MILK PRODUCTION						
Yield per cow	litres	7,723	8,384	661	8.6%	
Yield from all forage per cow	litres	2,330	2,759	429	18.4%	
Yield from grazed forage per cow	litres	911	954	43	4.7%	
% of total yield from forage		30%	33%	3%	9.0%	
Milk Price	pence	24.09	28.44	4.35	18.1%	
Total milk value per cow	£	1,860	2,385	525	28.2%	
Milk price : conc. price ratio		1.31	1.20	-0.11	-8.6%	
FEED						
Concentrate use per cow	kg	2,393	2,642	249	10.4%	
Concentrate use per litre	kg	0.31	0.32	0.01	3.2%	
Concentrate price per tonne	£	184	238	54	29.3%	
Other purchased feed cost per cow	£	47	50	3	6.4%	
Total purchased feed cost per cow	£	487	680	193	39.6%	
Total purchased feed cost per litre	pence	6.31	8.11	1.80	28.5%	
All P.Feed @ 86% DM equiv. per cow	kg	2,643	2,846	203	7.7%	
MARGINS						
MOPF per cow		£	1,373	1,704	331	24.1%
MOPF per litre		pence	17.78	20.33	2.55	14.3%

In total, the cost of all purchased feed has also fluctuated but overall has risen by 39.6% over the 10-year period, to £680/cow, with the highest year being 2019 when it reached £705/cow (due to additional feeding during the 2018 dry summer).

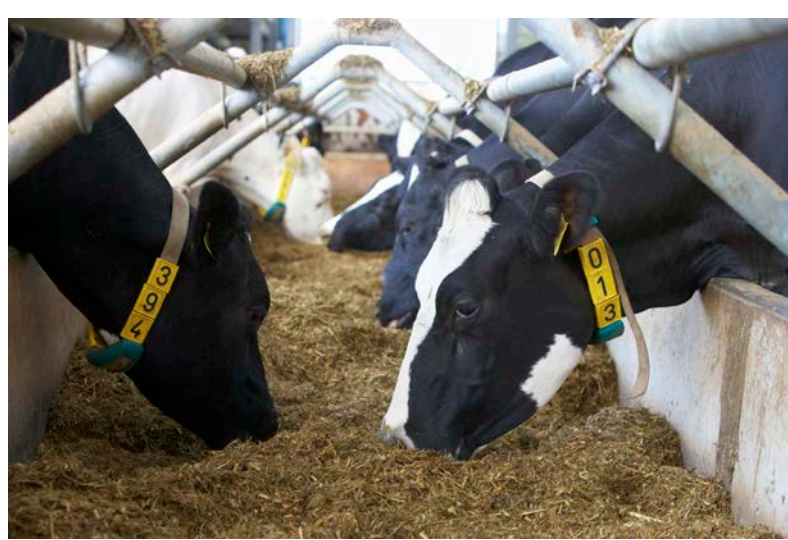
Some producers have changed their production system over the time to either a high input, high output system or the other end of the scale, a spring calving, extended grazing type system. A further analysis by production system can be found on page 6.

Overall, the average margin over purchased feed has risen by 24.1% to £1,704/cow, or by 14.3% per litre to 20.33p. Though margins are higher, other costs - notably labour costs - have also increased, meaning that the bottom-line profit will be similar to 2010 levels as Costs of Production increased year on year.



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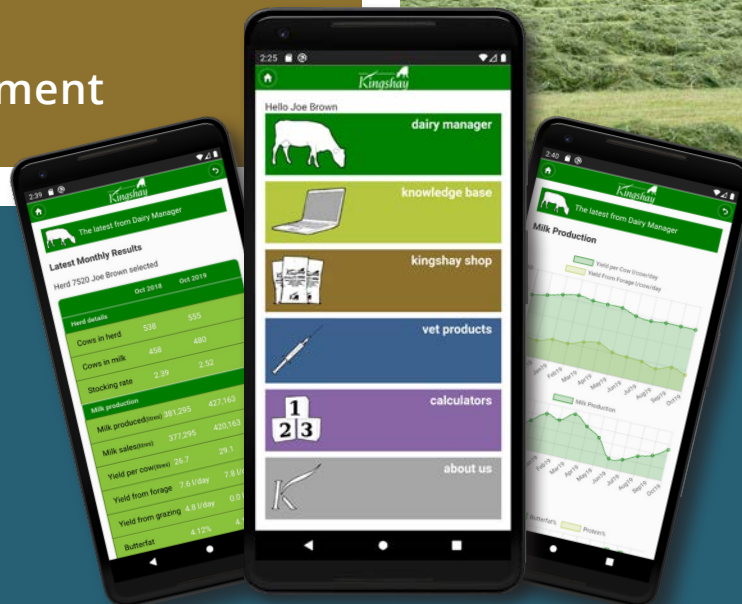
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PRODUCTION SYSTEMS

Organic production systems achieved the highest margins both per litre and per cow, however the benefits of conventional systems have still been evident over the past year.

ANNUAL RESULTS - YEAR END MARCH 2020								
		CONVENTIONAL HERDS					ORGANIC HERDS	
		System 1: Spring Calving Herds	System 2: Block Calving Herds (Grazing Focus)	System 3: Block Calving Herds (Housing Focus)	System 4: All Year Round Calving (Grazing Focus)	System 5: All Year Round Calving (Housing Focus)	System 1: Low/Moderate Yield	System 2: High Yield
Cows in herd		210	175	204	151	250	219	229
Stocking rate	cows/ha	2.57	2.33	2.14	2.33	2.62	1.81	1.79
Culling rate (%)		20%	25%	27%	25%	31%	25%	31%
MILK PRODUCTION								
Yield per cow	litres	6,161	6,739	8,744	7,022	9,575	5,330	7,529
Yield from all forage per cow	litres	3,208	3,018	3,117	3,198	1,644	2,947	3,380
Yield from grazed forage per cow	litres	2,291	1,207	1,401	914	178	1,692	1,287
Number of days grazing	days	263	238	182	196	122	229	226
% of total yield from forage		52%	45%	36%	46%	17%	55%	45%
Milk solids (kg per cow)		486	539	657	548	721	412	551
Milk Price	pence	28.50	29.29	28.50	28.61	28.61	38.33	38.03
Milk Price to Feed Price Ratio		1.22	1.22	1.21	1.19	1.22	0.98	0.96
MARGINS								
MOPF per cow	£	1,398	1,499	1,815	1,528	1,822	1,564	2,051
MOPF per litre	pence	22.69	22.24	20.76	21.76	19.03	29.34	27.24

WHICH SYSTEM ARE YOU?

Calving Pattern	Grazing Days (per year)	Production System	
Conventional Herds (All Breeds)	Spring Block Calving (70%+ of Herd Calving in Feb, Mar & Apr)	System 1. Spring Calving Herds 	
	Autumn Block Calving (70%+ of Herd Calving in Aug, Sep & Oct)	System 2. Block Calving, Grazing Focus 	
	Split Block Calving (70%+ of Herd Calving in Feb, Mar, Apr & in Aug, Sep & Oct)	System 3. Block Calving, Housing Focus 	
	All Year Round Calving	Above 160 Days Grazing*	System 4. All Year Calving, Grazing Focus
		Less than 160 Days Grazing*	System 5. All Year Calving, Housing Focus
	Organic Herds (All Breeds)	Less than 6250 litres per cow**	System 1. Organic, Low or Moderate Yield
Above 6250 litres per cow**		System 2. Organic, High Yield 	

* Where you have more than one grazing group, use a weighted average. e.g. A 250 cow herd with 150 high yielders grazing for 170 days a year and 100 lower yielders grazing for 220 days then: (150 cows x 170 days) + (100 cows x 220 days) = 47,500 grazing days. 47,500 days / 250 cows = an average of 202 grazing days.
 ** Yield is the average milk production per cow within a 12-month period.

Kingshay's 2018 production systems report compared data from seven different production approaches, allowing producers to identify with the system closest to their own and benchmark herd performance.

It is interesting to identify which system is more efficient – although much depends on whether producers are aiming for margin per litre, per cow or per hectare. The charts to the left are comparing Top 25% herds ranked by MOPF per litre or per cow depending on yield. In lower yielding herds, margin per litre will be more important with low input, organic herds taking the top spot at 29.34p/litre. For those aiming for higher yields, the focus will be margin per cow. High yielding organic herds had the highest margin per cow at £2,051/cow.

There are some interesting trends, with milk prices for block calving herds with a grazing focus higher than other systems; averaging 29.29p/litre. This could be due to seasonality, as this system is typically autumn calving, and would therefore be calving into a good milk price. Furthermore, many autumn calving herds sell on a constituents basis, and good milk solids are reflected in the price received.

As expected, spring calving systems, which have a peak milk output from April to June, had a lower average milk price.

In housing focused systems, culling rates were higher, with a higher proportion of forced reasons due to health and fertility issues (see page 20). It could also be that more heifers were coming into these herds due to the use of sexed semen.

MILK PRICE ANALYSIS

Milk prices have been relatively stable over the past year, although the gap between the top and bottom 10% of producers has widened – and the impact of COVID-19 could create more volatility in the months ahead.

As of March 2020, the gap between the highest and lowest milk prices was 9.1p/litre, an increase of 1p/litre on the year, 2.3p/litre higher than March 2017. However, this is a long way off the 13.9p/litre differential seen in 2016.

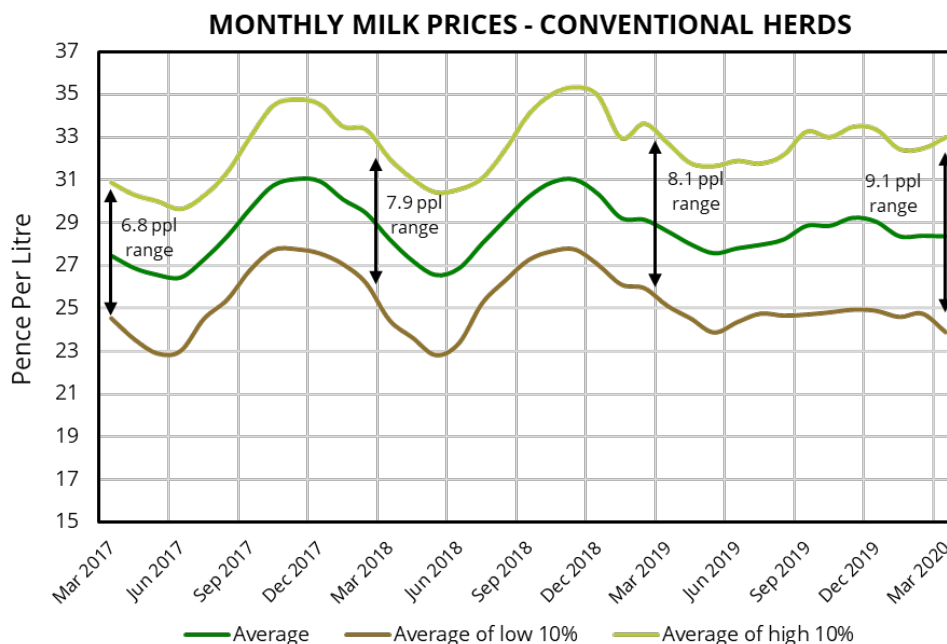
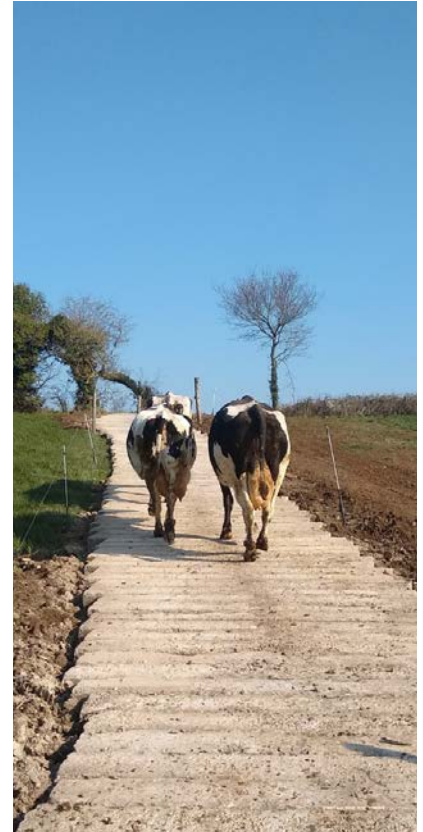
In 2020, the gap widened noticeably in March, with the top 10% seeing an increase in milk price to 33p/litre, while the bottom 10% experienced a price drop to 23.87p/litre. The best individual contract price (with no adjustments or seasonality) increased 0.55p/litre over the year, to 33.52p/litre - the highest since March 2015, when it topped at 34.41p/litre.

Due to this report running to the year ending March 2020, the figures do not represent how COVID-19 has impacted on milk values, as it really hit in April 2020 with some contract price cuts (which was predicted even without the influence of COVID-19)

and some producers having to dump milk. Conversely some contracts have held their prices and others have even increased. Despite issues around availability and delivery of bought in feed during the COVID-19 crisis, producers will have made better use of home-grown forages and grazing in rations to offset this.

A flexible business approach clearly makes producers more sustainable. However, it is anticipated that the gap between the top and bottom 10% of milk prices will continue to widen further over the coming months, with resulting challenges.

COVID-19 is likely to create more volatility in the market and though contract prices may vary further, this could be just a short-term impact. Producers should know their costs of production and adapt their businesses to withstand short-term price drops.



BEST VS LOWEST MILK PRICE CONTRACTS - CALCULATED BASED ON A LEVEL SUPPLY

Year ending	Mar 15	Mar 16	Mar 17	Mar 18	Mar 19	Mar 20
Top ppl	34.41	31.94	31.03	31.79	32.97	33.52
Bottom ppl	20.99	15.76	24.57	24.93	26.37	25.08
Difference ppl	13.42	16.18	6.46	6.86	6.60	8.44

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TRENDS IN MILK PRICES FOR ORGANIC & CHANNEL HERDS CAN BE FOUND ON PAGES 21-22

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MILK FROM FORAGE

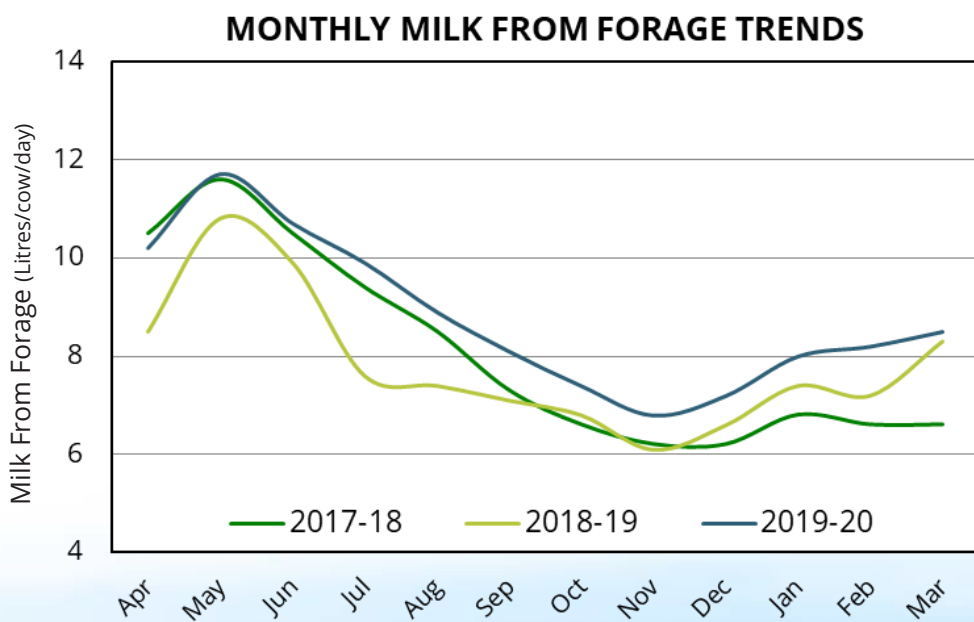
With much more favourable grass growing conditions through the spring and summer of 2019, it is not surprising that milk from forage has seen an upturn, despite the deluge suffered over the following winter in some areas of the UK.

Overall, average yields from forage increased from 2,486 litres (29.8% of total yield) in 2018/19 to 2,759 litres (32.9% of total yield) in 2019/20.

When comparing the top and bottom quartile of producers – ranked by milk from forage – the top 25% averaged 4,043 litres from all forage (48.6% of total yield), while the bottom 25% averaged just 1,313 litres (15.4% of total yield).

Total purchased feed costs reflect the higher inputs required where milk from forage is low, with the bottom quartile of producers having an average feed cost of 9.9p/litre against the top quartile at 6.45p/litre.

This had a marked impact on the margin over purchased feed – despite slightly higher milk yields in the bottom quartile – proving that making better use of quality forage has a bottom-line benefit.



The top 25% of producers achieved a margin of £1,853/cow (22.28p/litre) compared to just £1,563/cow (18.34p/litre) in the bottom 25%; a difference of £290/cow.

Extrapolating that to the average herd size of 200 cows equates to a difference of £58,000 between the top and bottom quartile – an increase of 14% on the 2018/19 £50,840 margin difference, undoubtedly affected by the cost of the additional 0.13kg/litre of concentrate fed in the bottom quartile.

ANNUAL RESULTS - YEAR END MARCH 2020 (RANKED BY MILK FROM FORAGE)

Holstein/Friesian, Conventional Herds					Top 10%	Top 25%	Average	Bottom 25%	Top 25% - last year	Average - last year
Cows in herd					191	185	200	219	183	205
Stocking rate	cows/ha				2.06	2.11	2.28	2.42	2.18	2.28
MILK PRODUCTION										
Yield per cow	litres				8,439	8,318	8,384	8,525	8,258	8,352
Yield from all forage per cow	litres				4,449	4,043	2,759	1,313	3,750	2,486
Milk Price	pence				28.60	28.73	28.44	28.24	29.13	28.99
FEED										
Concentrate use per cow	kg				1,977	2,120	2,642	3,205	2,184	2,638
Concentrate use per litre	kg				0.23	0.25	0.32	0.38	0.26	0.32
Concentrate price per tonne	£				240	239	238	237	241	239
Other purchased feed cost per cow	£				27	29	50	86	33	67
Total purchased feed cost per litre	pence				5.95	6.45	8.11	9.90	6.76	8.48
All P.Feed @ 86% DM equiv. per cow	kg				2,053	2,216	2,846	3,600	2,291	2,939
MARGINS										
MOPF per cow	£				1,911	1,853	1,704	1,563	1,847	1,713
MOPF per litre	pence				22.65	22.28	20.33	18.34	22.37	20.51



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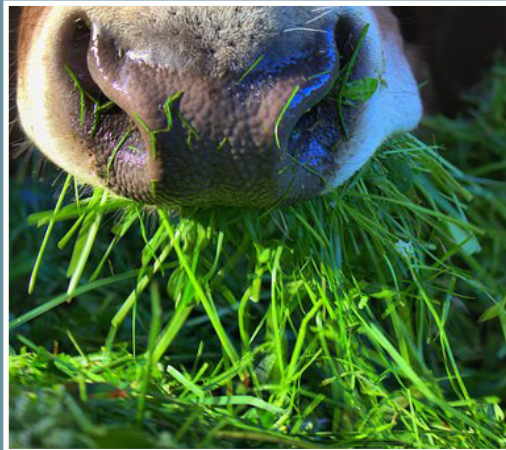
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Kingshay DAIRY MANAGER HEAD LONGEVITY REPORT

MONTHLY REPORT

Summary of farm performance metrics, including production, health, and financial data.

DAIRY INSIGHT SERVICE

REGIONAL ANALYSIS

Yields increased across all regions in 2019/20 (with the exception of Scotland), likely due to a fairer forage season, however the roll back of milk prices have eroded any gains from feed efficiency.

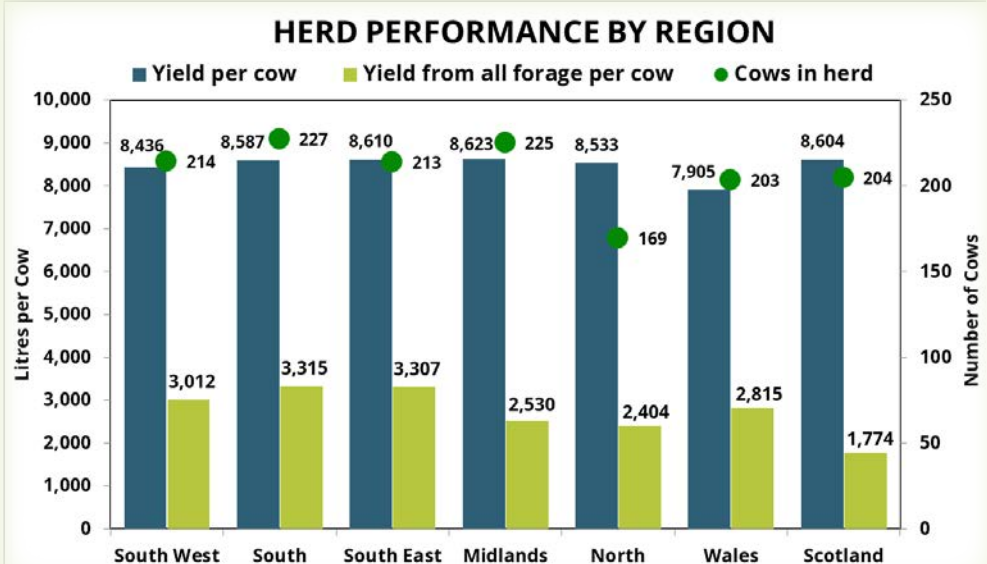
Having been the worst affected region through 2018/19, the South East saw the greatest increase in milk yields - up by 3.99% to 8,610 litres. In contrast, Scotland - which was less affected by the drought - saw yields drop by 1.08% to 8,604 litres, with the North having the lowest increase of 0.51% to 8,533 litres.

Assessing the inputs in these regions sheds some light on these trends. In the South East, yield from forage fell by 4.23% to 3,307 litres - perhaps due to a greater reliance on grass rather than other forage sources in 2018/19. There was also an increase in concentrate use from 2,277kg/cow to 2,468/cow.

ANNUAL RESULTS - YEAR END MARCH 2020							
Holstein/Friesian, Conventional Herds	South West	South	South East	Midlands	North	Wales	Scotland
Cows in herd	214	227	213	225	169	203	204
Stocking rate cows/ha	2.14	2.27	2.84	2.25	2.32	2.41	2.52
MILK PRODUCTION							
Yield per cow litres	8,436	8,587	8,610	8,623	8,533	7,905	8,604
Yield from all forage per cow litres	3,012	3,315	3,307	2,530	2,404	2,815	1,774
Milk Price pence	29.36	28.83	28.57	28.21	27.98	27.75	28.39
Change on last year pence	0.03	-0.32	-1.09	-0.52	-0.61	-0.73	-0.37
FEED							
Concentrate use per cow kg	2,639	2,451	2,468	2,782	2,785	2,424	3,006
Concentrate use per litre kg	0.31	0.29	0.29	0.32	0.33	0.31	0.35
Concentrate price per tonne £	241	234	239	235	234	240	241
Other purchased feed cost per cow £	43	63	55	60	65	38	84
Total purchased feed cost per cow £	679	636	644	713	716	619	808
Total purchased feed cost per litre pence	8.04	7.40	7.48	8.27	8.39	7.84	9.39
Change on last year pence	-0.24	-0.38	0.40	-0.26	-0.65	-0.40	-0.65
MARGINS							
MOPF per cow £	1,798	1,840	1,816	1,719	1,672	1,574	1,635
MOPF per litre pence	21.31	21.43	21.09	19.94	19.59	19.91	19.00
Change on last year pence	0.26	0.06	-1.48	-0.26	0.04	-0.34	0.27

The North increased milk from forage by 11%, to 2,404 litres/cow while maintaining concentrate use at 0.33kg/litre. And Scotland, where there is a higher proportion of robotic herds, had the highest increase in milk from forage - up by 24.4% to 1,774 litres, while reducing concentrate use from 0.36kg/litre to 0.35kg/litre.

Wales still had the lowest overall yield at 7,905 litres/cow, while the Midlands leads at 8,623 litres/cow.



Concentrate and other purchased feed costs dropped across all regions, resulting in an improvement in margins in most areas.

The South holds the highest margin over purchased feed, on both a per cow and per litre basis, at £1,840 and 21.43p respectively - up slightly by 0.06p/litre on last year. This is unsurprising given it had the least movement on milk price at 28.83p/litre and the lowest feed cost at 7.4p/litre.

In contrast, the South East - although having the second highest MOPF at £1,816/cow - saw a fall in milk price of 1.09p/litre, eroding any gains from higher yields and resulting in a £53/cow drop in margins, year-on-year.

Scotland had the lowest MOPF per litre, but surprisingly improved the most on 2018/19 - up by 0.27p/litre.

MILKING FREQUENCY

Efficiency is a strong focus for most farmers and choice of milking frequency has a bearing on feeding trends, yields and milk constituents – but what are the correlations between yields and margins?

In 2019/20 robotic milking herds grew significantly, from averaging 167 cows to 180, which could be linked to a rise in popularity of a 4-box robotic system to enable a larger herd size. In contrast, three-times-a-day milking herds reduced slightly, from 464 to 461 cows, and twice-a-day milking herds fell from 193 to 189 cows.

Three-times-a-day milking produced the highest yields, at 9,995 litres/cow, while robotic milking continued to close the yield gap, at 9,715 litres/cow. Twice-a-day milking, not surprisingly, brings up the rear at 8,263 litres/cow. Interestingly, average yields from twice-a-day milking increased by 78 litres (0.95%) year on year whilst robotic and three-times-a-day milking fell by 59 litres (-0.61%) and 69 litres (-0.69%) respectively. This could be down to changes in the feeding ratios of concentrates and other purchased feed.

Yield from all forage increased across all systems – perhaps unsurprising given the considerably better forage growing year in 2019. Twice-a-day milking produced 11.1% more from forage, at 2,866 litres,

robotic milking increased by 6.9% to 2,455 litres and thrice daily milking by 8.9% to 2,093 litres.

This, in turn, reduced the amount of purchased feed fed (at 86% DM equivalent), with twice-a-day milking showing the lowest input of feed at 2,730kg per cow, with concentrate use at 0.31kg/litre and total purchased feed costs at 7.9p/litre (£652/cow).

In contrast robotic and three-times-a-day milking herds still relied on purchased feed inputs for 75 to 79% of total yield produced. Both systems used 0.35kg/litre but thrice daily herds fed 209kg more per cow at 3,841 kg (at 86% DM equivalent).

As a result, margins for three-times-a-day herds remained the strongest per cow, at £1,982, perhaps given the edge by some herds attaining milk volume bonuses and having greater buying power when negotiating feed contracts. However, the twice a day milked herds performed the best on a per litre basis at 20.56p/litre.

ANNUAL RESULTS - YEAR END MARCH 2020				
Holstein/Friesian, Conventional Herds		Twice a day milking	Robotic milking	Three times a day milking
Cows in herd		189	180	461
Stocking rate	cows/ha	2.28	2.21	2.30
MILK PRODUCTION				
Yield per cow	litres	8,263	9,715	9,995
Yield from all forage per cow	litres	2,866	2,455	2,093
Milk Price	pence	28.46	28.76	29.08
FEED				
Concentrate use per cow	kg	2,538	3,417	3,475
Concentrate use per litre	kg	0.31	0.35	0.35
Concentrate price per tonne	£	238	245	235
Other purchased feed cost per cow	£	48	68	109
Total purchased feed cost per cow	£	652	907	925
Total purchased feed cost per litre	pence	7.90	9.33	9.25
All P.Feed @ 86% DM equiv. per cow	kg	2,730	3,632	3,841
MARGINS				
MOPF per cow	£	1,699	1,887	1,982
MOPF per litre	pence	20.56	19.42	19.83



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INPUT PRICE ANALYSIS

Input prices have varied across the board in the past year, with fertiliser and concentrate prices falling, and feed wheat markets settling lower than in March 2019 despite rising since September.

Although the milk price has fluctuated in line with seasonal trends, overall it has weakened by 0.47p/litre, year-on-year. In November 2019, it hit its highest value since December 2018 at 31.59p/litre, but by March 2020 it had fallen to 28.89p/litre.

White and red diesel values were almost identical in March 2020 compared to a year earlier, with crude oil fluctuating between \$50 and \$63/barrel until late February when it crashed amid the COVID-19 outbreak. Values fell into negative figures for the first time ever and remained at exceptionally low levels throughout April, May and June – which will have helped dairy producers keep a lid on fuel costs.

Fertiliser prices have been falling steadily since January 2019, when the price averaged £279/t, to a low of £218/t in February 2020 before recovering slightly to £221/t in March. Fertiliser is closely linked to the crude oil value,

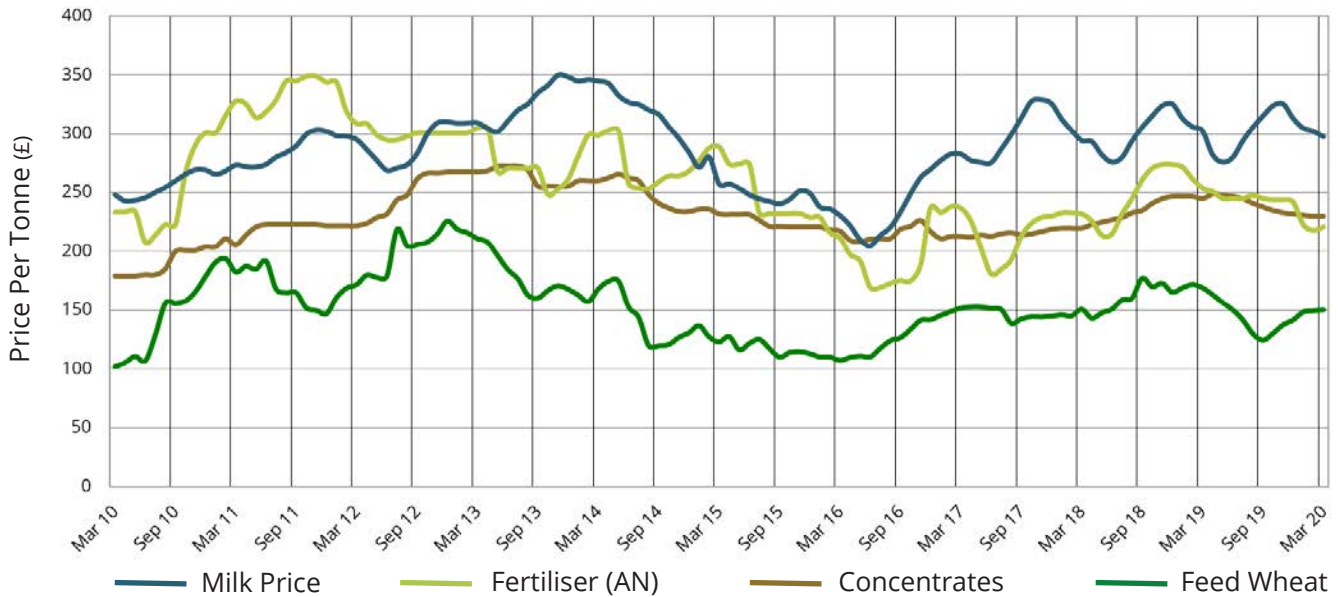
which makes it fairly volatile and tricky to buy at the right time – this volatility is likely to remain as the fuel price fluctuates.

Feed wheat values have been steadily climbing since September 2019 but have remained fairly stable since January 2020 around £150/t. However, this began to edge up nearer £160/t in June 2020, with the difficult autumn and winter likely to be reflected in 2020 harvest prices.

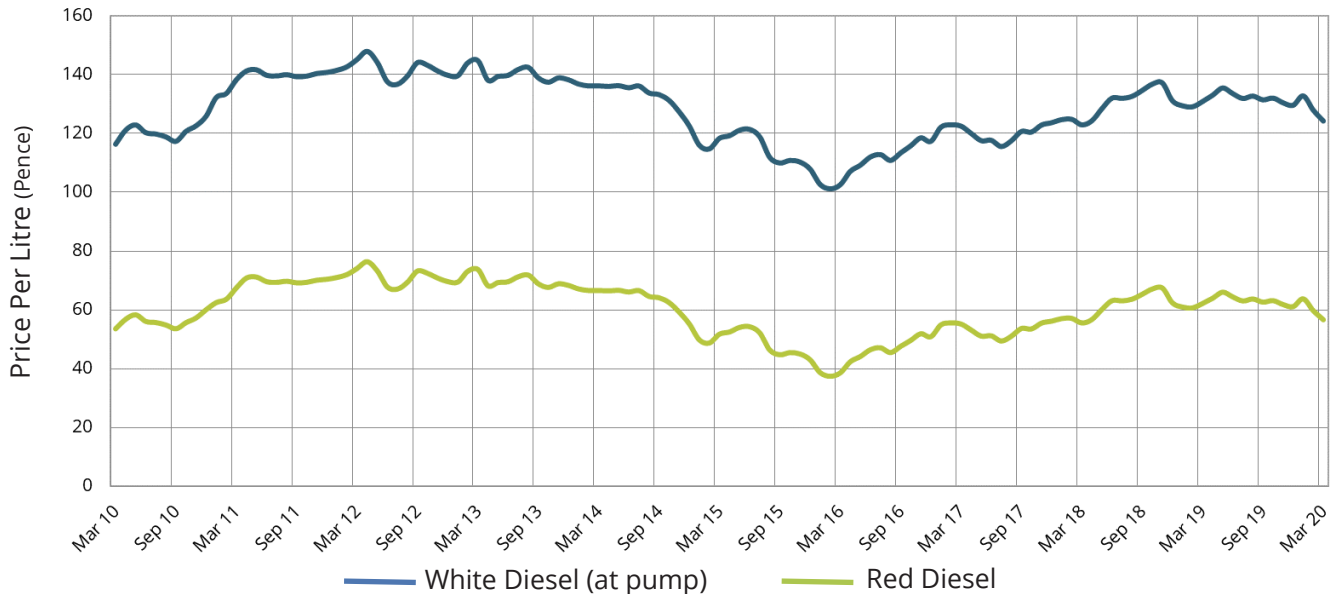
The cost of concentrates fell steadily from May 2019 to average out around the £230/t mark between January and March 2020, its lowest level since July 2018.

Despite these lower prices, producers should forward plan their feed orders as availability has become trickier during the COVID-19 pandemic, with nothing running at full capacity.

FEED & FERTILISER PRICES VS MILK PRICE



FUEL PRICES



MILK YIELD BANDS

Milk yield bands tend to follow a trajectory of higher yields to larger herds. But in a year following severe drought, there are ripples of year-on-year change.

Herd size has varied over the past year, with the greatest changes seen in the lower yielding band (up to 6,000 litres). These increased from 120 to 141 cows, while the highest yielding band (over 10,000 litres) fell from 316 to 276 – perhaps following on from the increased culling rate in 2018/19 given the drought and tight forage availability.

Milk price follows a similar trend to 2018/19, taking a slight dip at the 7,000 to 8,000 litre band where it is possibly more difficult to identify what influences bonuses.

As yields increase so does the purchased feed fed. However, the amount of purchased feed fed has fallen year-on-year, by 4.12% across all yield bands, with total milk from forage increasing from 32% to 35.5%. As a result, purchased feed costs have dropped by up to 0.51p/litre, year-on-year.

The lowest yielders (up to 6,000 litres) producing on average 46% of their milk from forage - feeding 1,547kg of purchased feed at 6.95p/litre, while the highest yielders (over 10,000 litres) produced just 23% from forage and fed 4,110kg at a cost of 9.22p/litre.

While margin over purchased feed per cow steadily increases with yield - with the highest yielders achieving £2,121/cow, there is an almost reverse trend on a per litre basis, with the lowest yielders achieving the highest margin of 21.22p/litre.

Purchased feed may be a worthwhile investment for higher yielding herds, but for most herds it is the highest single cost, so more sustainable outputs could be achieved by maximising production from home grown forage.



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ANNUAL RESULTS - YEAR END MARCH 2020

Holstein/Friesian, Conventional Herds		Up to 6,000 litres	6,000 to 7,000 litres	7,000 to 8,000 litres	8,000 to 9,000 litres	9,000 to 10,000 litres	Over 10,000 litres
Cows in herd		141	154	173	196	220	276
Stocking rate	cows/ha	2.03	2.45	2.22	2.19	2.32	2.45
MILK PRODUCTION							
Yield per cow	litres	5,398	6,614	7,498	8,495	9,437	10,882
Yield from all forage per cow	litres	2,466	2,854	2,901	2,868	2,682	2,512
% of total yield from forage		46%	43%	39%	34%	28%	23%
Milk Price	pence	28.17	28.17	28.12	28.53	28.69	28.71
FEED							
Concentrate use per cow	kg	1,485	1,849	2,245	2,639	3,108	3,725
Concentrate use per litre	kg	0.28	0.28	0.30	0.31	0.33	0.34
Concentrate price per tonne	£	245	239	240	236	237	240
Other purchased feed cost per cow	£	11	22	23	45	70	111
Total purchased feed cost per cow	£	375	464	562	669	806	1,003
Total purchased feed cost per litre	pence	6.95	7.01	7.49	7.87	8.54	9.22
All P.Feed @ 86% DM equiv. per cow	kg	1,547	1,956	2,355	2,834	3,394	4,110
MARGINS							
MOPF per cow	£	1,145	1,399	1,547	1,755	1,902	2,121
MOPF per litre	pence	21.22	21.16	20.63	20.66	20.15	19.49

HERD SIZE BANDS

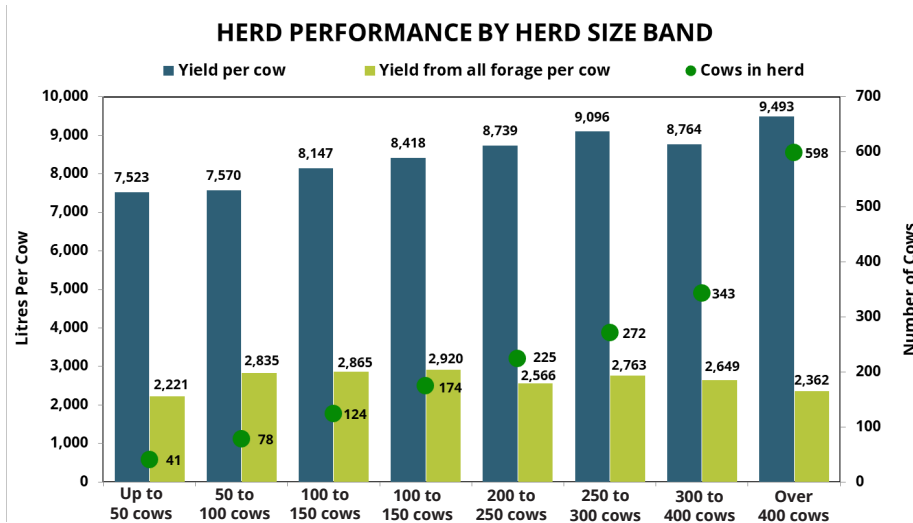
Yields have generally increased on last year – although there is considerable variation depending on herd size – with the smallest and largest herds both seeing a slight decline in average production.

This variation may be due to improved forage availability and quality compared to 2018/19 and subsequent changes in herd management across the different bands. The general trend of yields increasing with herd size is evident, with the smallest averaging 7,523 litres/cow and the largest 9,493 litres/cow.

Smaller herds tend to produce more from forage, with the highest yield from forage in the 150 to 200 cow band at 2,920 litres (34.69% of total yield). This clearly helps keep purchased feed costs in check, at 7.93ppl.

Milk price is at its lowest in the smallest herds, at 27.05p/litre, peaking at 29.57p/litre in the 300 to 400 cow band, largely influenced by volume bonuses. As a result, the larger herds' higher milk price and yields comfortably offset their greater feed use and costs.

Margin over purchased feed rises with herd size, from £1,401/cow (18.62p/litre) to £1,993/cow (20.99p/litre) at either end of the scale. Equally, margins are strong in the 150 to 200 cow band, where inclusion of quality forage in rations is maximised, at 20.63p/litre, highlighting that economic gains can be forged from middling sized herds focused on production from forage.



ANNUAL RESULTS - YEAR END MARCH 2020		Up to 50	50 to 100	100 to 150	150 to 200	200 to 250	250 to 300	300 to 400	Over 400
Holstein/Friesian, Conventional Herds		COWS	COWS	COWS	COWS	COWS	COWS	COWS	COWS
Cows in herd		41	78	124	174	225	272	343	598
Stocking rate	cows/ha	1.27	1.90	2.05	2.32	2.53	2.52	2.69	2.85
MILK PRODUCTION									
Yield per cow	litres	7,523	7,570	8,147	8,418	8,739	9,096	8,764	9,493
Yield from all forage per cow	litres	2,221	2,835	2,865	2,920	2,566	2,763	2,649	2,362
Milk Price	pence	27.05	27.39	28.27	28.57	28.66	28.87	29.57	29.32
FEED									
Concentrate use per cow	kg	2,464	2,292	2,493	2,592	2,862	2,890	2,852	3,182
Concentrate use per litre	kg	0.33	0.30	0.31	0.31	0.33	0.32	0.33	0.34
Concentrate price per tonne	£	248	249	242	238	233	233	231	222
Other purchased feed cost per cow	£	22	20	41	51	68	82	62	83
Total purchased feed cost per cow	£	634	591	645	668	735	756	720	791
Total purchased feed cost per litre	pence	8.43	7.80	7.91	7.93	8.41	8.31	8.21	8.33
All P.Feed @ 86% DM equiv. per cow	kg	2,581	2,396	2,670	2,777	3,118	3,185	3,105	3,539
MARGINS									
MOPF per cow	£	1,401	1,483	1,659	1,737	1,769	1,870	1,872	1,993
MOPF per litre	pence	18.62	19.59	20.36	20.63	20.25	20.56	21.36	20.99



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HEALTH TRENDS

Incidences of health issues were variable in 2020, with mastitis cases falling but occurrences of lameness increasing, according to data from Kingshay’s Health Manager.

Levels of mastitis fell to their lowest in the past five years, down from 49 cases per 100 cows in 2016 to 36 in 2020; three cases below the 2019 figure. Mastitis incidence during the winter months was particularly low this year, with producers focusing on reducing cases as it has a knock-on effect on productivity and fertility too.

In contrast, incidences of lameness were at their highest in three years at 42 cases per 100 cows in 2020, up two cases on 2019 and four on 2018. The prolonged wet autumn and winter in the 2019/2020 season may have contributed to higher levels of lameness in herds.

Cases Per 100 Cows	Group	Top 25%	Est. Cost per Case	Group Cost	Top 25% Cost	Difference
Mastitis	36	18	£261	£9,396	£4,698	£4,698
Lameness	42	22	£179	£7,518	£3,938	£3,580
Milk Fever	3.8	1.9	£236	£898	£449	£449
Displaced Abomasums	3.1	0.8	£280	£868	£224	£644
Difficult Calvings	4.6	2.9	£338	£1,555	£981	£575
Retained Cleansings	5.5	4.0	£425	£2,335	£1,698	£637
Abortions	4.1	1.7	£528	£2,166	£898	£1,268
Metritis	7.2	4.6	£183	£1,320	£843	£477
TOTAL				£26,056	£13,729	£12,327

Cases Per 100 Cows	2016	2017	2018	2019	2020
Mastitis	49	41	39	39	36
Lameness	45	43	38	40	42

Culling for lameness fell from 6.6% to 5.9% in the past year (see page 20), which could also be a reason lameness cases increased, as lame cows were being kept in the herd and treated.

There is still a long way to go for producers to cut costs, with the top 25% of herds spending an average of £12,327 per 100 cows less than the mean. Herd management will play a key role in this as the top 25% had fewer health issues across the board, keeping their costs at much lower levels.

FERTILITY TRENDS

Fertility trends have generally improved over the past year, with calving interval dropping below 400 days but culling for infertility increased to 7.9%.

Calving intervals tightened across the board by 3 days, with days to first service remaining fairly stable. However, services per conception and conception rates dropped slightly to 2.5 and 38% respectively.

The average herd’s cost of infertility increased by 0.3p/litre to 2.34p/litre (£199/cow) due to higher culling for infertility, rather than changes in milk or feed prices.

Assuming a 28.5p/litre milk price, concentrate costs of £235/tonne, a 200-cow herd and a yield of 8,500 litres/cow, this equates to an annual cost of £39,800 for the herd.

Infertility culling rates were higher on average at 7.9% compared to 6.8% in 2019, suggesting that herds were culling harder to improve fertility as cull cow prices remained strong.

FERTILITY TRENDS	
Fertility Status	Group
Calving interval	397
Days to first service	71
Services per conception	2.5
Conception rate	38%
100 day In calf rate	41%
200 day not in calf rate	17%
Infertility culling rate	7.9%
Cost of Infertility (ppl)	2.34
Cost of Infertility (£/Cow)	£199
Cost of Extended Calving Interval Per Day	£4.09



HEALTH MANAGER

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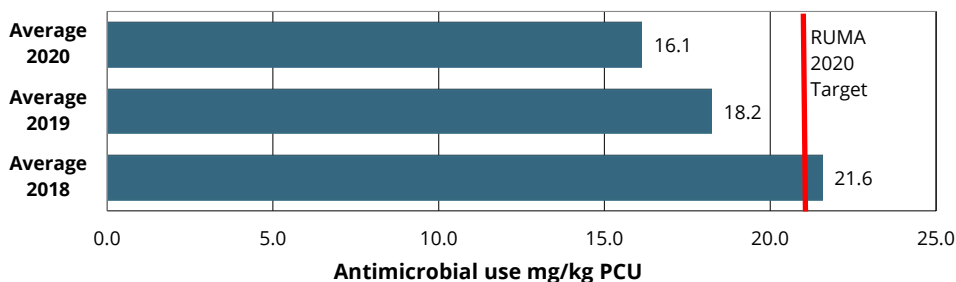
ANTIMICROBIAL USAGE

Over the last 3 years antimicrobial usage has been dropping, but will all herds have reached the RUMA targets by the end of 2020?

There has been increased pressure to reduce the reliance on antimicrobials in agriculture and as a result targets were set for each sector based on an estimation on their usage in 2015. RUMA (responsible use of medicines authority) who set the initial targets are due to review these at the end of this year. In 2017 they set 6 specific targets for the dairy industry with the main focus on the total mg of antimicrobial per kg of population corrected unit (mg/kg PCU). This is a way of comparing antimicrobial usage across different species with a European approved set of standards to calculate the result.

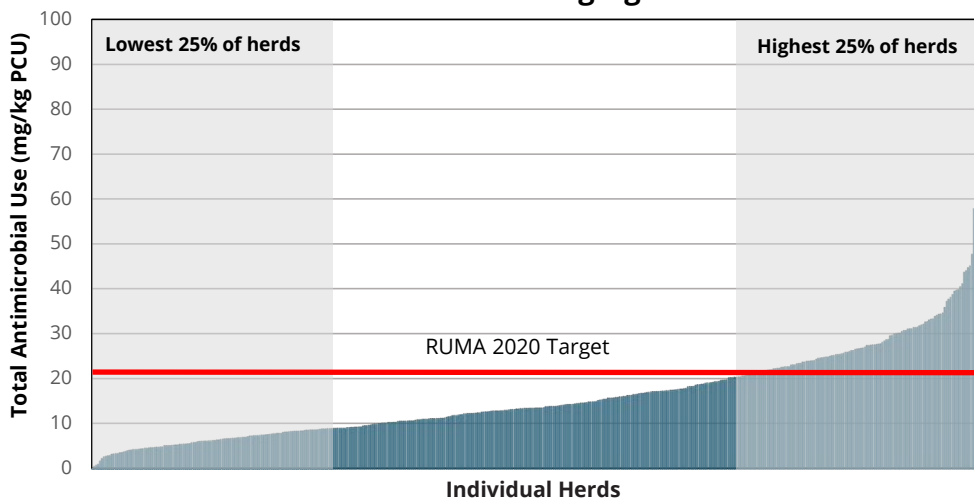
Kingshay's antimicrobial reporting service was first launched in 2017 and some significant reductions have taken place since. Total antimicrobial usage has reduced from 21.6 to 16.1mg/kg PCU, a decrease of 25%. During this time Red Tractor regulations have been updated to stipulate that an annual antimicrobial review takes place with a veterinary professional and the use of CIAs (Critically Important Antimicrobials) has been restricted. This shift in focus has helped with the reductions observed.

TOTAL ANTIMICROBIAL USAGE mg/kg PCU - YEAR END MARCH



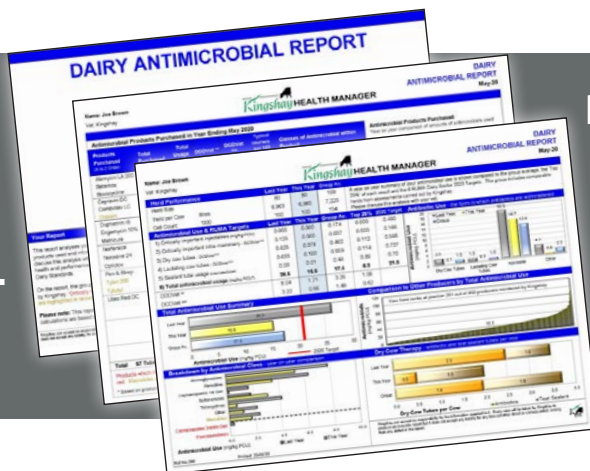
When looking closer into what type of products were used on farm, it is clear that Penicillins are the most common antimicrobial class followed by Aminoglycosides. Products that are classed as 'Critically important' have significantly reduced by an average of 66% from 2018 to 2020. The number of herds using these critically important antimicrobials has also reduced, with only 9% of herds using any in 2020, compared to 82% of herds in 2018.

DAIRY ANTIMICROBIAL USE - INDIVIDUAL HERDS RANKED BY mg/kg PCU



Across the UK there is still a wide range of antimicrobial usage in dairy herds, from the lowest at 0.05mg/kg PCU to 98.48mg/kg PCU for the year ending March 2020. 74% of herds were under the RUMA 2020 target of 21mg/kg PCU. However, the highest users have a long way to go to reach or be under the 2020 target by the end of the year.

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REASONS FOR COWS LEAVING THE HERD

Culling rates have risen with increasing cow numbers, yet the number of cows leaving in the first three lactations hasn't really changed in the past 20 years.

The overall rate of cows leaving the herd was 29% in 2019/20, the same as in 2018/19, with 49% of these leaving in their first three lactations, again the same as last year.

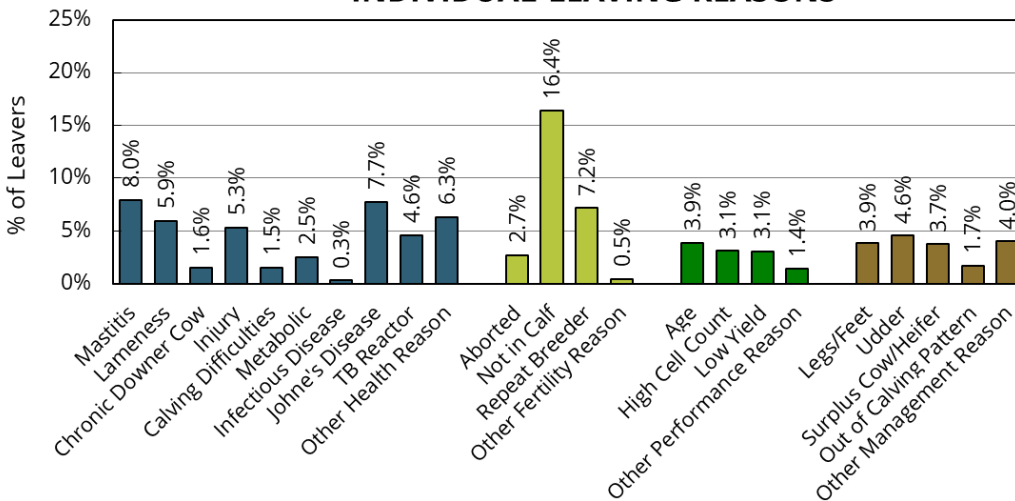
At 70%, forced culls rose two percentage points on the previous year, with selected culls accounting for the remaining 30%. Historically this does fluctuate, but health and fertility could have pushed up forced cullings.

The most prevalent reason for cows leaving the herd remained not being in-calf, accounting for 16.4% of leavers, down slightly from 16.9% last year. Mastitis was again the second main reason (8%), however culling for Johne's disease (7.7%) has increased quite a bit on last year (5.6%), putting it as the third most common reason - ahead of last year's number three, lameness.

PROPORTION OF COWS LEAVING THE HERD - FORCED VS SELECTED

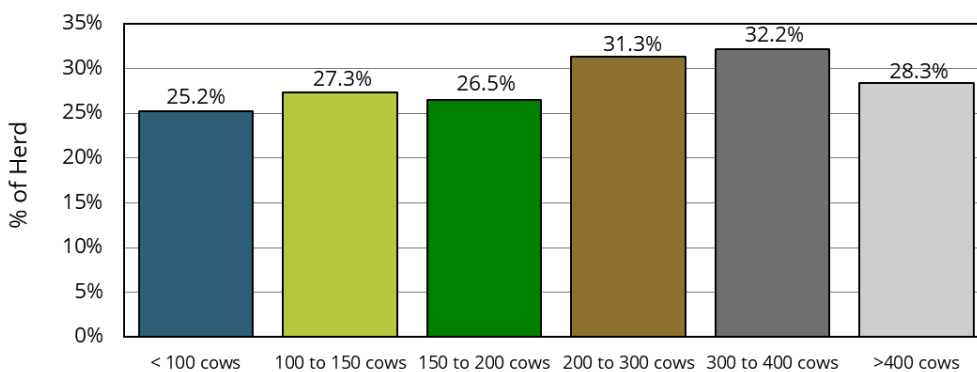


INDIVIDUAL LEAVING REASONS



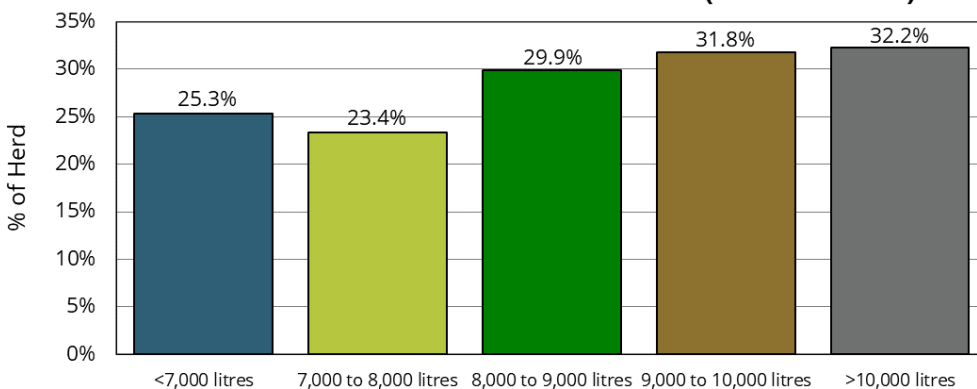
It is likely that a lot of producers have been trying to get on top of Johne's, which has led to an increase in the cows culled for this reason. Previously cows with Johne's disease may have been left in the herd or culled for other reasons.

COWS LEAVING HERD BY HERD SIZE BAND (CULLING RATE)



Herds yielding above 8,000 litres were culled at gradually higher rates as output increased, with those producing over 10,000 litres culled at 32.2%. Those yielding between 7,000 and 8,000 litres were culled at the lowest rate of 23.4%. Interestingly, higher yielding herds have culled more than in 2018/19, while lower yielding herds have culled less.

COWS LEAVING HERD BY YIELD LEVEL (CULLING RATE)



Larger herds of 300 to 400 cows saw a culling rate of 32.2%, a lot higher than last year (27.1%). However, herds with over 400 cows saw culling rates drop from 29.2% to 28.3%. Herds of 150 to 200 cows also saw a notable drop in culls, down 2.7 percentage points to 26.5%.

In both larger and higher yielding herds, residual health and fertility issues from the 2018 drought might account for producers culling harder than in previous years.

Larger herds may also have more issues with herd management. In herds using sexed semen and rearing their own replacements, there will be a lot of heifers coming through and producers may be culling harder to get rid of the lowest performing cows.

ORGANIC UPDATE

After the dry summer of 2018 and the subsequent lower yields, there has been a notable recovery in organic herds in the year to March 2020.

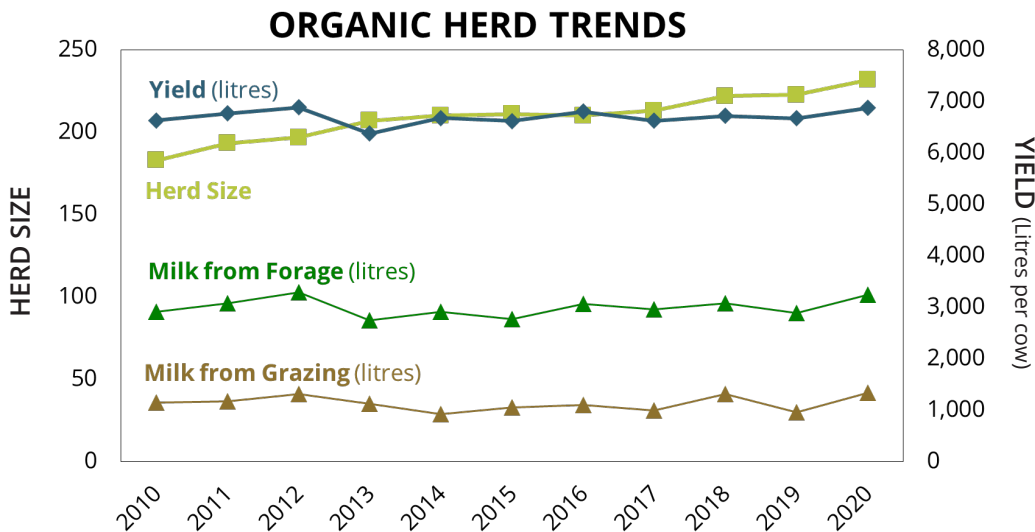
Cow numbers increased by 7.9% year-on-year, to 232, while yields rose by 3.5% to 6,867 litres.

Unsurprisingly, yield from forage increased significantly, rising 14.9% to 3,240 litres per cow. This was expected after the poor grazing season in 2018 which left many producers short on forage. However, it was also considerably higher than the 2,982 litres recorded during the 2016/17 season.

Many organic producers have gone down the route of planting more herbal leys recently, which include more drought tolerant species. It is likely this could have helped contribute to the increased yields from forage.

The average margin over purchased feed increased slightly per cow, up 1.9% to £1,902, but it fell on a per litre basis, down 1.5% to 27.7p. The increase in the former was a result of increased yields, while the fall in per litre values was because of a drop in organic milk prices.

High yielding organic systems achieved an average margin over purchased feed of £2,051/cow while low and moderate yielding herds averaged £1,564/cow (see page 6). The lower yielding systems had a better margin per litre though, at 29.34p compared to 27.24p in higher yielding herds.



Grazing days were similar between both systems, with lower yielding herds averaging only three days more than higher yielding herds, at 229 days. However, they produced 10% more yield from grazed grass - comprising 55% of total yields. The milk price was also 0.3p/litre higher for these herds at 38.33p/litre, but yields were 2,199 litres per cow lower, at 5,330 litres, likely due to reduced concentrate usage.

Organic milk prices are still holding strong despite the COVID-19 pandemic but it will be difficult to predict supply and demand in the short-term. However, demand is historically good and some milk processors are branching out to other markets to keep it growing.

ANNUAL ROLLING RESULTS					
Holstein/Friesian, Organic Herds (comparing matched herds)		Year Ending March 2019	Year Ending March 2020	Difference	% Change
Cows in herd		215	232	17	7.9%
Stocking rate	cows/ha	1.76	1.75	-0.01	-0.6%
MILK PRODUCTION					
Yield per cow	litres	6,636	6,867	231	3.5%
Yield from all forage per cow	litres	2,821	3,240	419	14.9%
Butterfat	%	4.01	4.06	0.05	1.2%
Protein	%	3.26	3.34	0.08	2.5%
Cellcount		187	176	-11	-5.9%
Milk Price	pence	39.31	38.11	-1.20	-3.1%
FEED					
Concentrate use per cow	kg	1,869	1,775	-94	-5.0%
Concentrate use per litre	kg	0.28	0.26	-0.02	-7.1%
Concentrate price per tonne	£	392	397	5	1.3%
Other purchased feed cost per cow	£	10	10	0	0.0%
Total purchased feed cost per cow	£	743	715	-28	-3.8%
Total purchased feed cost per litre	pence	11.20	10.41	-0.79	-7.1%
All P.Feed @ 86% DM equiv. per cow	kg	1,898	1,802	-96	-5.1%
MARGINS					
MOPF per cow	£	1,866	1,902	36	1.9%
MOPF per litre	pence	28.12	27.70	-0.42	-1.5%

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CHANNEL ISLAND UPDATE

Like many other production systems, a focus for Channel Island herds has been on gaining yield from forage rather than concentrates.

Overall yields increased by 2.5% to 5,979 litres/cow in the year to March 2020, with butterfat and protein rising to 5.45% and 3.87% respectively. Producers managed this despite increasing milk from forage by 15.2% to 2,163 litres, mainly due to the far better growing season than 2018.

Channel Island milk contracts are favoured towards high butterfat due to the nature of their breeds, and producers successfully boosted milk solids by 3.8% to 575kg/cow.

This was probably helped by a small increase in concentrate use per cow of 0.4% to 2,051kg/cow. The better forage meant other purchased feed cost dropped by 24.7% to £70/cow. As a result, producers managed to increase their margin over purchased feed

by 1.0% to £1,499/cow.

However, a drop in milk price, from 35.98p/litre to 34.96p/litre – combined with the higher yields, mean margins on a per litre basis fell by 1.5%, to 25.07p/litre. In addition, higher labour, rent and fuel prices will have eroded overall profit margins.

When compared to conventional and organic Holstein Friesian herds, Channel Island producers look a poor relation on a per cow basis, with conventional margins pegged at £1,704/cow and organic at £1,902/cow. However, taking the breeds' naturally lower yields into account, margins on a per litre basis (25.07p/litre) split the two, with conventional and organic margins at 20.33p/litre and 27.70p/litre, respectively.

ANNUAL ROLLING RESULTS					
Channel Island, Conventional Herds (comparing matched herds)		Year Ending March 2019	Year Ending March 2020	Difference	% Change
Cows in herd		180	178	-2	-1.1%
Stocking rate	cows/ha	2.50	2.67	0.17	6.8%
MILK PRODUCTION					
Yield per cow	litres	5,832	5,979	147	2.5%
Yield from all forage per cow	litres	1,877	2,163	286	15.2%
Butterfat	%	5.41	5.45	0.04	0.7%
Protein	%	3.83	3.87	0.04	1.0%
Milk solids	kg/cow	554	575	21	3.8%
Milk Price	pence	35.98	34.96	-1.02	-2.8%
FEED					
Concentrate use per cow	kg	2,042	2,051	9	0.4%
Concentrate use per litre	kg	0.35	0.34	-0.01	-2.9%
Concentrate price per tonne	£	255	254	-1	-0.4%
Other purchased feed cost per cow	£	93	70	-23	-24.7%
Total purchased feed cost per cow	£	614	591	-23	-3.7%
Total purchased feed cost per litre	pence	10.53	9.88	-0.65	-6.2%
All P.Feed @ 86% DM equiv. per cow	kg	2,358	2,318	-40	-1.7%
MARGINS					
MOPF per cow	£	1,484	1,499	15	1.0%
MOPF per litre	pence	25.45	25.07	-0.38	-1.5%



MEET THE TEAM

Everyone at Kingshay plays a key part in the efficient running of Dairy Manager, not just the team below, it's very much a whole team effort. Give us a call on **01458 851555** or email dairy.manager@kingshay.co.uk.



KATHRYN ROWLAND

Senior Farm Services Manager

Kathryn joined in 2002 and now manages the Dairy Manager service. A key part of her role is analysing key performance data and writing technical articles for publication. She also runs the Profit Manager service and business management training workshops.



FELICITY GALE

Farm Services Specialist

Felicity is the main contact for any technical and customer service queries regarding your herd(s) and is responsible for the smooth running of the costings service. She joined the team in 2013 and now regularly analyses production results and industry trends for key clients.



HAYLEY TINCKNELL

*Service Support Specialist
(On Maternity Leave)*

Hayley joined the team in 2018 and is responsible for producing the marketing and promotional materials for Dairy Manager, as well as managing the website. She also supports other areas of the business including FarmIQ, an online training platform for a variety of agricultural/veterinary topics.



LILY HOWARD

Service Support & Marketing Coordinator

Lily is currently covering Hayley's maternity leave and joined in 2019. She is responsible for all things marketing, including managing Kingshay's social media sites and designing fliers, leaflets and reports. When other areas of the business require additional support, she is on hand to help.



CHRISTINA FORD

Services Development Specialist

Christina manages the Antimicrobial reporting service alongside other corporate projects and joined Kingshay in 2019 to further develop the services we provide. She is also involved with data analysis and industry trends.



RICHARD SIMPSON

Development Director

Richard has been heavily involved in the design, development and operation of the costings service from the beginning, when it first started 20 years ago. He joined Kingshay in 1994 and now manages the data integration and large data projects for Dairy Manager, alongside leading the Kingshay team.



INDEPENDENT DAIRY SPECIALISTS

PUT OUR INDEPENDENT INFORMATION, SERVICES AND ADVICE TO WORK ON YOUR FARM TO BUILD A HEALTHIER, MORE PROFITABLE FUTURE.

Technical Knowledgebase

Our Dairy Insight Users have a wealth of Dairy Industry knowledge at their fingertips, via the Kingshay App, the internet and regular mailings. We also offer membership options for veterinary practices, farm advisers, colleges, universities and corporate bodies.

Dairy Manager

If you measure it, you can improve it. The UK's leading dairy costings service with options to track herd health status and bottom line profit.

AgriBudget

The Farm Finance planner, AgriBudget, offers a 1 to 5 year budgeting tool to monitor cash flow, review enterprise gross margins and future business performance. A must have for farmers and consultants.

Consultancy

Our team of Agricultural Consultants and Associates bring their skills and expertise to your door wherever you farm in the UK.

Training

Do you need practical and informative training for you and your staff? We provide tailored workshops on a wide range of subjects, to suit your specific requirements.

Tools and Analysis

We provide the everyday analysis and tools every Dairy Farmer needs to maximise their resources, from soil analysis to plate meters.

South West Dairy Development Centre

Kingshay, in partnership with the Agricultural Engineering Precision Innovation (Agri-EPI) Centre, part of the Government funded Innovate UK Agri Tech programme, has developed a state-of-the-art dairy centre to promote sustainable milk production in the UK.

Data Services

Over the past 10 years, we have combined our skills and expertise to develop bespoke tools to organisations across the agricultural industry.

For any further information on the above services, call our team on **01458 851555**.



Search 'Kingshay Farming'

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