



# DAIRY COSTINGS FOCUS

ANNUAL REPORT 2021



- 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

## WELCOME

Kingshay has reached its 30th year and has undergone some major changes since we first began at Henley Manor, Crewkerne. Still at the heart of what we do is providing independent research, advice and tools/services to dairy producers and industry professionals.



No one is going to forget 2020 in a hurry! The Kingshay Team have embraced the challenge of working at home due to COVID-19 and have used technology to hold virtual meetings and communicate effectively to our remote team. There was a slight delay in the post at times, but more and more producers are entering their own data online (give us a call to get set up!) and receiving their reports by email rather than postal copies.

In the **10th edition of our Dairy Costings Focus Report**, we look back at the challenges faced by many producers over the past year, and the impact on margins over purchased feed. We are, once again, focusing on **Production Systems** (page 6), as well as including a new section on **Crossbreeds**  (page 22). We often get asked "Which system is more profitable?". The answer is not straight forward. As with any type of system, there are such a wide range of efficiencies and challenges. But it is very much about having the right system for your farm, staff and type of cows and the right attitude and management flexibility to succeed and spot potential opportunities.

To find out more about Dairy Manager and Kingshay's other services, please call our team on 01458 851555, email dairy.manager@kingshay.co.uk or visit www.kingshay.com.

The Kingshay Team

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## **INTRODUCTION**

Revisiting herd performance data year after year provides tremendous value to dairy producers - it makes it easier to spot trends, highlight improvements and areas for greater focus. But individual data has its limitations - only by bringing together figures from across the industry can we help producers to benchmark against other, similar systems. We encourage you to use this report to add value to your own business - pick apart your figures and see where further improvements could be made.

This report looks at performance and efficiency data from herds using our dairy costings service.

There are some really encouraging trends in recent years – the bottom quartile of producers have managed to really narrow the gap on the top 25% across every type of system. Herd health and fertility have seen particular improvements, with every health issue recorded in the **Kingshay Health Manager** dropping, year-on-year. Mastitis, lameness, and cell counts are all

markedly improved, while infertility costs have dropped by 13%, to  $\pm$ 176 /cow.

For the first time this year, we've produced figures for crossbred herds, as well as Channel Island and organic herds, all of whom are making tremendous use of forage. Over all herds, yields from forage have consistently increased over the past three years, although concentrate usage has also risen across the board to support higher yields.

But there remains a big difference in margin between those who make the best use of forage and those who don't – and with soaring feed prices that effect will likely become even more pronounced this year.

Yields and milk solids all reached a record high this year, but with higher input costs margins have taken a hit, particularly given the impact of the COVID-19 lockdown on milk prices last year. As ever, attention to detail and incremental gains will be the key to success (regardless of system type) in the year ahead.



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# TRENDS OVER THE PAST 10 YEARS

After many years of increasing herd sizes, the past three years have seen a reverse of that trend, with average herd size falling from 210 in 2018 to 203 now. That is still 22% up on 2011, but it's the first time that herd size has shrunk in at least 20 years. This may be due to producers splitting large herds into two smaller units, as well as flying herds not restocking due to high heifer prices.

Yields, however, have continued to grow strongly, reaching a new record high of 8,512 litres/cow. That reflects rapid growth of 509 litres/cow since 2017 but is only 537 litres up on 2011, after which levels largely stagnated, probably due to knock-on effects of the dreadful summer weather in 2012. Over that time, stocking rates have crept up from around the 2.2 cows/ ha mark to about 2.3/ha, reflecting greater adoption of intensive rotational grazing and an increase in housed systems.

Yields from forage have risen sharply over the past couple of years, from 2,463 litres to 2,842 – although they have fluctuated over the past 20 years, from 2,111

(in 2013) to 2,871 (in 2005) due to differing growing seasons. Yields from grazing have shown similar variability, but the percentage of yield from all forage has steadily declined, from 41% in 2001 to 27% in 2015. Since then, it has bounced back above the 30% mark, reaching 33% this year.

Unsurprisingly, concentrate use has steadily increased, from 1,808kg/cow in 2001 to 2,667kg/cow this year – although on a per litre basis it has remained steady since the late noughties, at about 0.3kg/litre, due to higher yields. Feed prices have soared by 36% over the past decade, while milk prices have gained just 14%.

ANNUAL ROLLING RESULTS						
Holstein/Friesian, Conventional H	lerds	Year Ending Mar 2001	Year Ending Mar 2011	Year Ending Mar 2021	Difference - 10 years ago	% Change
Cows in herd		118	167	203	36	21.6%
Stocking rate	cows/ha	2.10	2.23	2.28	0.05	2.2%
MILK PRODUCTION						
Yield per cow	litres	6,607	7,975	8,512	537	6.7%
Yield from all forage per cow	litres	2,733	2,511	2,842	331	13.2%
Yield from grazed forage per cow	litres	747	777	826	49	6.3%
% of total yield from forage		41%	32%	33%	2%	6.0%
Milk Price	pence	17.10	24.95	28.42	3.47	13.9%
Total milk value per cow	£	1,130	1,990	2,419	429	21.6%
Milk price : conc. price ratio		1.38	1.28	1.16	-0.11	-9.0%
FEED						
Concentrate use per cow	kg	1,808	2,395	2,667	272	11.4%
Concentrate use per litre	kg	0.27	0.30	0.31	0.01	3.3%
Concentrate price per tonne	£	124	195	244	49	25.1%
Other purchased feed cost per cow	£	13	51	54	3	5.9%
Total purchased feed cost per cow	£	237	518	705	187	36.1%
Total purchased feed cost per litre	pence	3.59	6.50	8.28	1.78	27.4%
All P.Feed @ 86% DM equiv. per cow	kg	1,961	2,654	2,873	219	8.3%
MARGINS						
MOPF per cow	£	893	1,472	1,714	242	16.4%
MOPF per litre	pence	13.52	18.46	20.14	1.68	9.1%



Due to the higher yields, margins over purchased feed are £244/cow higher than they were in 2011, although they have declined by £28/ cow since 2018. On a per litre basis, margins have narrowed by 0.98p/litre since 2018 to 20.16p/litre - 1.71p/litre up on 2011 and 6.66p/litre higher than in 2001.

Butterfat has increased sharply over the past two years, to a record high of 4.19%, putting milk solids also at a record high of 638kg. And producers have done a great job with milk hygiene, reflected by the trend in cell counts. These peaked at 193,000 from 2008 to 2010 and have since dropped back to around the 160,000 mark over the past five years.





# **DATA SERVICES**

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# **PRODUCTION SYSTEMS**

# Looking across the production systems, it's interesting to note that in most cases, the bottom 25% has narrowed the gap on the rest of the sample, which makes for encouraging reading.

While no one system is right for all, organic farms once again topped the table in terms of margin over purchased feed, both on a per litre and per cow basis. High yielding organic systems made the most per cow, while low to moderate yielding organic farmers averaged highest on a per litre basis.

ANNUAL RESULTS - YEAR END MARCH 2021									
			CO	NVENTIONAL HEF	RDS		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		196	191	220	154	232	231	218	
Stocking rate	cows/ha	2.60	2.26	2.22	2.26	2.35	1.77	1.65	
Culling rate (%)		28%	27%	26%	25%	29%	24%	30%	
MILK PRODUCTION									
Yield per cow	litres	6,211	6,816	8,800	7,026	9,530	5,343	7,588	
Yield from all forage per cow	litres	3,161	3,092	3,284	2,722	2,701	2,936	3,461	
Yield from grazed forage per cow	litres	2,471	1,052	893	751	69	2,214	1,080	
Number of days grazing	days	254	238	184	202	116	228	221	
% of total yield from forage		51%	45%	37%	39%	28%	55%	46%	
Milk solids (kg per cow)		487	545	669	551	720	423	554	
Milk Price	pence	29.48	29.36	28.79	28.24	28.58	37.81	37.45	
Milk Price to Feed Price Ratio		1.21	1.22	1.18	1.15	1.18	0.98	0.96	
MARGIN OVER PURCHASED FEED (MOP	F)								
MOPF per cow	£	1,447	1,526	1,836	1,436	1,887	1,538	2,037	
MOPF per litre	pence	23.30	22.39	20.86	20.44	19.80	28.79	26.85	



WHICH SYSTEM ARE YOU?

\* 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.

This analysis provides producers with a system close to their own, with which they can benchmark figures more closely. This is an update of Kingshay's 2018 production systems report where we compared seven different production approaches, analysing the use of grazing and calving pattern on margins.

There remains a large range between the different systems. If in the lower tier of their group, producers might want to evaluate key areas to focus on to improve efficiencies.

Lower yielding systems, we have ranked producers' margins on a per-litre basis, while higher yielders will likely put more value on per cow margins. The difference between the top and bottom 25% of herds equates to between £80,068 (in year-round calving systems with a grazing focus) to £150,638 (in high yielding, organic systems).

All year round calvers with a grazing focus had the lowest margin per litre, averaging 20.4p/litre, with spring block calvers topping the table at 23.3p/litre. Among the high yielding systems, all year round calvers with a housing focus narrowly beat block calving herds with a housing focus, averaging £1,887/cow and £1,836/cow, respectively.

# MILK PRICE ANALYSIS

COVID-19 had a marked impact on spot prices in April / May last year, with producers who supply the food service sector, being badly hit in lockdown. Lower level prices therefore dropped sharply, from around the 25p/litre level to just 20p/litre.

However, top-end milk prices, most of which are aligned contracts, were relatively unaffected outside the usual seasonal dip, so the gap between top and bottom widened from 9.1p/litre in March 2020 to around 11.8p/litre in May 2020. Fortunately, spot milk prices rebounded quite rapidly as processors quickly adapted and found alternative outlets, and by March 2021 the gap between top and bottom price levels had narrowed to 9.3p/litre.

Many producers found a new route to market during COVID-19 lockdowns, with soaring demand for local purchasing driving a boom in farm shop sales and milk vending machines. That has helped to boost prices at the top end of the scale.

Non-aligned milk prices continued to strengthen, and some contracts (those more closely linked to spot milk prices) overtook aligned contract prices for the first time in about five years. Given the complexity involved in supplying aligned contracts and the additional criteria/costs to comply (including routine mobility/body condition scoring), some producers may be tempted to change contract. However, they should remember that the point of aligned contracts is to provide stability, evening out both the peaks and troughs of market pricing. When analysing average milk prices by contract type, this showed that the gap between the average aligned and non-aligned contracts had actually widened to 2.14ppl (previous year was a 1.87ppl gap).

It is also important to closely look at getting the most out of your milk contract, particularly if you are on a constituents contract. There may be more potential gains to be made on milk solids to improve the milk price received. Focus on areas that are under your control.



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



www.dairymanager.net



Best Vs L	owest	Milk Price	Contracts	- Calculat	ed based	on a level	supply
Year endir	ıg	Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21
Тор	ppl	31.94	31.03	31.79	32.97	33.52	32.80
Bottom	ppl	15.76	24.57	24.93	26.37	25.08	25.34
Difference	ppl	16.18	6.46	6.86	6.60	8.44	7.46

Source: AHDB Dairy



## MILK FROM FORAGE

Yields from forage have increased consistently over the past three years, but there remains a marked difference between the top and bottom quartile of producers.



#### MONTHLY MILK FROM FORAGE TRENDS

On average, cows produced 2,842 litres/cow of milk from forage in 2020/21, compared to 2,759 litres/cow last year and 2,486 litres/cow the year before.

However, producers have not cut concentrate use over that time, instead opting to invest in greater milk yields in preference to cutting costs. As a result, over the past three years, concentrate use has increased gently, from 2,638kg/cow to 2,667kg/cow, contributing to an overall increase in milk yields, from 8,352 litres to 8,512 litres.

But there remains a marked difference between the top and bottom producers, with the top quartile producing 4,068 litres from forage against the bottom quartile at 1,447 litres. Concentrate use reflected this trend, with each quartile using 2,215kg per cow and 3,294kg, respectively.

Unsurprisingly, those farmers producing the least from forage had more intensive stocking rates and greater herd numbers, with higher overall yields but lower milk prices. But the effect on margin over purchased feed remained significant, with the top quartile of producers averaging a margin of £1,884/head against the bottom quartile at £1,585/head.

Even when the higher yields are taken into account, the difference in MOPF per litre remains clear: 18.21p/ litre in the bottom 25% against 22.04p/litre in the top quartile. At a difference of 3.83p/litre, it's clearly worth investing in better forage and grassland management – regardless of whether you have a more intensive housed system – to make the most of home-grown forage values.

ANNUAL RESULTS - YEAR END							
Holstein/Friesian, Conventional H	erds	Тор 10%	Тор 25%	Average	Bottom 25%	Top 25% - last year	Average - last year
Cows in herd		188	188	203	229	185	200
Stocking rate	cows/ha	2.03	2.16	2.28	2.41	2.11	2.28
MILK PRODUCTION							
Yield per cow	litres	8,659	8,548	8,512	8,704	8,318	8,384
Yield from all forage per cow	litres	4,446	4,068	2,842	1,447	4,043	2,759
Milk Price	pence	28.96	28.82	28.42	28.10	28.73	28.44
FEED							
Concentrate use per cow	kg	2,083	2,215	2,667	3,204	2,120	2,642
Concentrate use per litre	kg	0.24	0.26	0.31	0.37	0.25	0.32
Concentrate price per tonne	£	248	245	244	240	239	238
Other purchased feed cost per cow	£	37	38	54	93	29	50
Total purchased feed cost per litre	pence	6.39	6.78	8.28	9.89	6.45	8.11
All P.Feed @ 86% DM equiv. per cow	kg	2,171	2,314	2,873	3,619	2,216	2,846
MARGINS							
MOPF per cow	£	1,954	1,884	1,714	1,585	1,853	1,704
MOPF per litre	pence	22.57	22.04	20.14	18.21	22.28	20.33

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# **REGIONAL ANALYSIS**

# There are always going to be regional variations in dairy farm performance, based on climatic and price differentials.

As with last year, the South West performed the best on a per-litre basis, achieving an average margin over purchased feed of 21.37p/litre. It was the only region to show an increase in margin on the year, of 0.06p/litre, with all other areas showing a slight decline. However, this wasn't due to any climatic favourability, but more down to the fact that milk prices in the region increased by 0.16p/litre, compared to a 0.36p/litre decline in other areas.

<b>ANNUAL RESULTS - YEAR EI</b>	NNUAL RESULTS - YEAR END MARCH 2021									
Holstein/Friesian, Conventional	l Herds	South West	South	South East	Midlands	North	Wales	Scotland		
Cows in herd		211	234	230	226	181	200	216		
Stocking rate	cows/ha	2.17	2.30	2.74	2.30	2.19	2.35	2.69		
MILK PRODUCTION										
Yield per cow	litres	8,498	8,786	8,607	8,624	8,647	7,998	8,928		
Yield from all forage per cow	litres	3,101	3,409	3,197	2,715	2,422	2,973	1,910		
Milk Price	pence	29.52	28.94	28.57	27.85	27.74	27.57	28.07		
Change on last year	pence	0.16	0.11	0.00	-0.36	-0.24	-0.18	-0.32		
FEED										
Concentrate use per cow	kg	2,648	2,521	2,514	2,707	2,835	2,403	3,025		
Concentrate use per litre	kg	0.31	0.29	0.29	0.31	0.33	0.30	0.34		
Concentrate price per tonne	£	245	239	242	239	240	247	244		
Other purchased feed cost per cow	£	45	68	68	62	66	36	95		
Total purchased feed cost per cow	£	692	671	676	708	747	631	834		
Total purchased feed cost per litre	pence	8.15	7.64	7.85	8.21	8.64	7.89	9.35		
Change on last year	pence	0.11	0.24	0.37	-0.06	0.25	0.05	-0.04		
MARGINS										
MOPF per cow	£	1,816	1,871	1,784	1,693	1,651	1,574	1,671		
MOPF per litre	pence	21.37	21.30	20.72	19.64	19.10	19.69	18.72		
Change on last year	pence	0.06	-0.13	-0.37	-0.30	-0.49	-0.22	-0.28		



Milk prices remained the highest in the South West, at 29.52p/litre while Wales again brought up the rear at 27.57p/litre. Yields per cow increased across the board, perhaps due to more selective culling in recent years removing lower performers from the herd. However, Scotland and the South of England showed the most marked increases – although it's not entirely clear why this might be.

All areas apart from the South East increased their yields from forage in the year to March 2021, while the South East experienced a 110-litre drop to 3,197 litres/cow – possibly due to the dry summer leading to more feeding of purchased feed rather than forage. Producers in the South produced the most from forage, at 3.409 litres/ cow, while Scotland – with its predominance of housed herds in the group – produced the least, at 1,910 litres/ cow. Except for Wales, all areas grew the average herd size, with the South of England topping the table at 234 head and the North bringing up the rear at 181. The South East retained the highest stocking rates, at 2.74 cows/ ha, with the South West remaining the most extensive systems, at 2.17 cows/ha.

# MILKING FREQUENCY

There have been some quite marked changes between different milking systems over the past year, although in margin terms the ranking remains unchanged.

Although the average herd size across the board has declined, twice-a-day milkers actually increased their cow numbers this vear, from 189 to 198 head. In contrast, robotic milkers slimmed down by two to 178, while those milking three times a day cut their cow numbers sharply, from 461 to 405. This may be due to increased selective culling rather than a genuine change in direction for the sector.

Robotic milkers showed a drastic change in stocking rates, too – from 2.21 cows/ha to 1.87, perhaps reflecting the growing number of people running robots in a grazing system.

ANNUAL RESULTS - YEAR END	ANNUAL RESULTS - YEAR END MARCH 2021									
Holstein/Friesian, Conventional H	lerds	Twice a day milking	Robotic milking	Three times a day milking						
Cows in herd		198	178	405						
Stocking rate	cows/ha	2.30	1.87	2.45						
MILK PRODUCTION										
Yield per cow	litres	8,375	9,576	10,424						
Yield from all forage per cow	litres	2,915	2,555	2,100						
Milk Price	pence	28.49	28.49	28.84						
FEED										
Concentrate use per cow	kg	2,584	3,366	3,537						
Concentrate use per litre	kg	0.31	0.35	0.34						
Concentrate price per tonne	£	243	250	235						
Other purchased feed cost per cow	£	50	58	160						
Total purchased feed cost per cow	£	679	899	990						
Total purchased feed cost per litre	pence	8.10	9.39	9.49						
All P.Feed @ 86% DM equiv. per cow	kg	2,776	3,542	4,079						
MARGINS										
MOPF per cow	£	1,707	1,830	2,017						
MOPF per litre	pence	20.38	19.11	19.35						

When it comes to yield, three-times-a-day milkers jumped from 9,995 litres/cow last year to 10,424 litres, while twice-a-day herds increased from 8,263 litres to 8,375. In contrast, robotic milkers actually lost 139 litres, to 9,576 – likely due to the fact that they fed fewer concentrates, year-on-year, while the other systems both fed more.

As would be expected, three-times-a-day milkers fed the most concentrates per cow, and twice-a-day the least, while milk from forage showed the opposite trend. Milk prices have moved in opposite directions, with twice-a-day herds receiving 0.03p/litre more than last year, while robotic milkers got 0.27p/litre less and three-times-a-day milkers 0.24p/litre less. However, three-times-a-day herds still claimed the top price, likely due to volume bonuses.

With regard to margins, three-times-a-day milkers commanded the highest MOPF per cow, at £2,017, with twice-a-day herds bringing up the rear at £1,707. Both showed an increase on last year while robotic milkers dropped £57 to £1,830 due to the lower yields and milk price combined.



# Kingshay DAIRY MANAGER

# Dairy Manager, the UK's leading dairy costings service enables you to track your costs and your herd health status.

Our packages detailed below include options for targeted reports, allowing you to create and monitor regular production forecasts, highlight key health issues, compare your herd to similar herds and calculate your bottom line profit.

# <section-header><section-header>

Annual Summary

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\*First two months FREE OF CHARGE does not apply to Profit Manager or the Antimicrobial Reporting service.

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## **INPUT PRICE ANALYSIS**

#### Brexit and COVID-19 have both had a significant impact on input prices over the past year, with many costs dipping in spring and summer of 2020. However, since then, commodity values have soared, putting many producers under pressure.

The past year had demonstrated more than any other the benefit of buying inputs forward when an opportunity can be seen. In spring last year, the COVID-19 pandemic meant many commodity markets slumped. White and red diesel hit a low of 112p/litre and 46.2p/litre, respectively, before recovering to 128p and 59.9p in March 2021. Fertiliser did the same, with ammonium nitrate dropping to £200/t in June 2020 and then regaining ground to a six-year high of £283/t in March 2021.

Over a similar period, hit by adverse global weather, feed prices have soared. In February last year, feed wheat was selling for  $\pm 150$ /t, with soyameal at  $\pm 305$ /t.

By February 2021, those prices had jumped to  $\pounds$ 203/t and  $\pounds$ 410/t, respectively – with wheat reaching its highest level for eight years.

Although the milk price has increased slightly over the past year, it will not have been enough, on average, to cover the hike in input costs. Those producers who have had the ability to forward price their inputs will therefore have fared far better than others trading on the spot market.

With the future impact of Covid and Brexit looking uncertain, and climate change continuing to affect global crop production, commodity markets are likely to remain volatile. Buying power will be an important consideration to keep costs down.



# MILK YIELD BANDS

# The gap between the performance of herds in the extreme yield bands continues to widen, with the lower yielding herds dropping both herd numbers and yield while the highest yielding herds continue to grow in both aspects.

On average, the lowest yielding herds (below 6,000 litres/cow) dropped from 141 cows to 133 over the past year, while the highest yielders (over 10,000 litres/cow) grew from 276 to 291 head. At the same time, yields per cow fell from 5,398 litres/cow to 5,227 litres/cow in the former category, compared with growth from 10,882 litres to 10,974 litres in the latter group.

Margins are also directly related to herd size and productivity, with the smallest, lower yielding herds making the greatest margin over purchased feed per litre, at 21.23p/litre, and yet the narrowest margin per cow, at £1,110. In contrast, the highest yielding herds had a MOPF of just 19.54p/litre, but on a per-cow basis made an impressive £2,145.

So, what about those in the middle? Generally speaking, yields and herd size are intimately correlated, whereas milk price doesn't show such a link. Higher yielding herds all used more concentrates per cow, with price per tonne dropping as herd size increased, reflecting stronger buying power.

On a per-litre basis, MOPF doesn't vary much among those in the middle yielding ground, with many producers targeting higher yields at the expense of reduced yields from forage and increased concentrate costs. These producers may do well to focus on improved margins rather than increased production at all costs.

ANNUAL RESULTS - YEAR END MARCH 2021										
Holstein/Friesian Conventional	Herds	Up to 6,000	6,000 to	7,000 to	8,000 to	9,000 to	Over 10,000			
	icius	litres	7,000 litres	8,000 litres	9,000 litres	10,000 litres	litres			
Cows in herd		133	151	161	201	228	291			
Stocking rate d	:ows/ha	1.85	2.53	2.22	2.19	2.44	2.33			
MILK PRODUCTION										
Yield per cow	litres	5,227	6,566	7,510	8,539	9,456	10,974			
Yield from all forage per cow	litres	2,390	2,891	2,982	2,899	2,809	2,682			
% of total yield from forage		46%	44%	40%	34%	30%	24%			
Milk Price	pence	28.41	27.88	27.95	28.63	28.67	28.76			
FEED										
Concentrate use per cow	kg	1,444	1,838	2,216	2,699	3,077	3,653			
Concentrate use per litre	kg	0.28	0.28	0.30	0.32	0.33	0.33			
Concentrate price per tonne	£	252	245	244	244	241	243			
Other purchased feed cost per cow	£	11	16	26	42	75	124			
Total purchased feed cost per cow	£	375	467	567	700	816	1011			
Total purchased feed cost per litre	pence	7.18	7.12	7.55	8.20	8.63	9.22			
All P.Feed @ 86% DM equiv. per cow	kg	1,512	1,915	2,337	2,869	3,356	4,077			
MARGINS										
MOPF per cow	£	1,110	1,363	1,533	1,744	1,895	2,145			
MOPF per litre	pence	21.23	20.76	20.41	20.43	20.04	19.54			



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## HERD SIZE BANDS

Herds with 200 to 300 cows have made big improvements over the past year, although the largest herds remain the most productive and profitable on a margin over purchased feed basis.

Producers with between 200 and 300 cows are the only ones to have increased yields, milk from forage, and milk price at the same time as curbing concentrate use and overall purchased feed costs per cow at 86% dry matter equivalent. This must have required significant attention to detail, and it's not clear why it is only producers in this herd size bracket who have improved efficiency.

At opposite ends of the scale, those producers with up to 50 cows have seen yields decline from 7,523 litres/cow to 7,267 litres/cow. They have produced more milk from forage and reduced concentrate use, which, with slightly higher milk prices, has resulted in margins per cow remaining unchanged year-on-year, at £1400/cow.

In contrast, producers with over 400 cows have increased yields from 9,493 litres/cow to 9,664 litres/cow.



This has been driven by increased concentrate usage, with milk from forage actually declining. As a result, overall purchased feed use at 86% dry matter increased from £3,539kg/cow to £3,663kg/cow, despite the increased buying power such producers have.

This year though, the high-input, high-output system appears to have paid off, with the largest producers securing the best milk price of 29.63p/litre due to volume bonuses. They have therefore achieved highest MOPF on both a per cow and per litre basis, at £2,035/cow and 21.06ppl, respectively.

<b>ANNUAL RESULTS - YEAR END</b>	MARCH	2021							
Holstein/Friesian Conventional H	erds	Up to 50	50 to 100	100 to 150	150 to 200	200 to 250	250 to 300	300 to 400	<b>Over 400</b>
noistenii mesian, conventionarm	crus	cows	cows	cows	cows	cows	cows	cows	cows
Cows in herd		41	78	123	175	224	273	343	578
Stocking rate	cows/ha	1.31	1.72	2.09	2.34	2.46	2.59	2.44	2.88
MILK PRODUCTION									
Yield per cow	litres	7,267	7,737	8,082	8,476	8,888	9,247	9,094	9,664
Yield from all forage per cow	litres	2,820	2,972	2,864	2,886	2,810	2,911	2,789	2,355
Milk Price	pence	27.31	27.21	28.13	28.48	28.79	29.12	29.28	29.63
FEED									
Concentrate use per cow	kg	2,211	2,283	2,512	2,668	2,856	2,872	2,907	3,222
Concentrate use per litre	kg	0.30	0.30	0.31	0.31	0.32	0.31	0.32	0.33
Concentrate price per tonne	£	259	254	250	243	241	236	232	225
Other purchased feed cost per cow	£	12	29	35	51	69	84	76	104
Total purchased feed cost per cow	£	585	609	664	699	756	760	750	829
Total purchased feed cost per litre	pence	8.05	7.87	8.21	8.25	8.51	8.22	8.25	8.58
All P.Feed @ 86% DM equiv. per cow	kg	2,282	2,423	2,657	2,842	3,091	3,147	3,198	3,663
MARGINS									
MOPF per cow	£	1,400	1,496	1,610	1,715	1,802	1,932	1,912	2,035
MOPF per litre	pence	19.27	19.34	19.92	20.23	20.28	20.90	21.03	21.06
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# **HEALTH TRENDS**

#### Dairy producers have really got on top of health issues, with all cases recorded in Kingshay Health Manager dropping, year-on-year.

Mastitis cases have dropped markedly over recent years, from 41 cases per 100 cows in 2017 to just 32 cases in 2021. Lameness has followed a similar downward trend, from 43 cases per 100 in 2017 to 36 cases this year. Lameness did increase in 2019/2020

Cases per 100 cows	Group	Тор 25%	Est. Cost per Case	Group Cost	Top 25% Cost	Difference
Mastitis	32	16	£244	£7,808	£3,904	£3,904
Lameness	36	19	£204	£7,344	£3,876	<b>£3,468</b>
Milk Fever	2.7	0.8	£217	£586	£174	£412
Displaced Abomasums	2.8	0.9	£299	£837	£269	£568
Difficult Calvings	3.8	1.7	£331	£1,258	£563	£695
Retained Cleansings	3.9	2.5	£463	£1,806	£1,158	£648
Abortions	3.7	1.8	£502	£1,857	£904	£954
Metritis	6.9	4.2	£178	£1,228	£748	£481
TOTAL				£22,724	£11,594	£11,130

Cases per 100 cows	2017	2018	2019	2020	2021
Mastitis	41	39	39	36	32
Lameness	43	38	40	42	36

partly due to the prolonged wet autumn and winter. but is back down again now, likely due to a combination of increased culling for lameness reasons (see page 20) and the use of mobility scoring/ routine foot trimming/ footbathing.

> Looking at all of the main health incidences in the table below, every one is down, year-on-year, which is a great result. Encouragingly, the gap between the top 25% and the average group has narrowed in terms of the costs involved. Last year, the average cost of all recorded health issues was £26,056 – this year that has dropped to £22,724. The top 25% averaged £11,594 - a gap of £11,130, down from £12,327 last year.

> This means that the average group are making significant strides in improving herd health - and the financial benefits are clear to see.

# FERTILITY TRENDS

Fertility has improved again over the past year, with the calving interval remaining unchanged at 397 days but fewer services per conception required and fewer animals culled for infertility.

This year, cows averaged Assuming a milk price of 68 days to their first service compared to 71 last year. Services per conception dropped from 2.5 to 2.4 and the 100-day in-calf rate increased from 41% to 43%. As would be expected given these trends, the 200-day not in-calf rate dropped £176, down from £199 last from 17% to 16%, while the infertility culling rate fell from 7.9% to 6.7%, year-onyear.

28.4p/litre, concentrate costs of £245/t, a herd size of 200 cows and a yield of 8,500 litres, the cost of infertility across recorded herds fell from 2.34p/litre last year to 2.07p/litre in 2021. On a per cow basis, that equates to year. The cost of an extended calving interval, per day, is £4.03 versus £4.09 - still a considerable amount and reflecting the importance of good fertility to every herd.

Fertility Status	This Year	Last Year
(Year ending)	(March 2021)	(March 2020 <b>)</b>
Calving interval	397	397
Days to first service	68	71
Services per conception	2.4	2.5
Conception rate	38%	38%
100 day In calf rate	43%	41%
200 day not in calf rate	16%	17%
Infertility culling rate	6.7%	7.9%
Cost of Infertility (ppl)	2.07	2.34
Cost of Infertility (£/Cow)	£176	£199
Cost of extended calving interval per day	£4.03	£4.09



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Analyse your herd's fertility costs with our Health Manager package. Visit our website

www.kingshay.com for more information.

# ANTIMICROBIAL USAGE

# The last few years have seen an impressive decline in the total antimicrobial usage, but how many herds have successfully reached the 2020 RUMA target?

Kingshay has been monitoring antimicrobial usage for the last 4 years, with over 550 herds continually being assessed year on year. Analysis of the data showed that 77% of herds were below the RUMA (Responsible Use of Medicines in Agriculture Alliance) targets of 21 mg/kg PCU for 2020, an increase of 38% from 2018.

However, the total antimicrobial usage was only one of six targets that RUMA set. There has been a continuation of reduced usage across the targets, with the amount of critically important antimicrobials reducing from 1.5

mg/kg PCU in 2018 to 0.39 mg/kg PCU in 2021. Only 6% of herds used a critical antimicrobial in 2021 down from 82% in 2018, a huge reduction in these antimicrobials that need to be protected for human medicine.

One target that was not met was the teat sealant tube usage of 0.7 courses/cow. This has decreased over the years from 0.72 courses/cow in 2018 to 0.62 courses/ cow this year as opposed to the increased usage that was intended.



TOTAL ANTIMICROBIAL USAGE mg/kg PCU - YEAR END MARCH

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



Across the UK there is a large range in usage from 0.14 to 67.04 mg/kg PCU which has narrowed compared to last year where the range was 98.4 mg/kg PCU.

Investigating further into the products used, Penicillin remains the most popular class of products with usage increasing from 5.16 mg/kg last year to 5.76 mg/kg this Cephalosporins vear. 1st Generation also increased in 2021 with a rise of 89% compared to last year. This is likely to be a result of using other antimicrobials to try and reduce the usage of the more critical product types. In contrast, 7 of the remaining product classes saw reductions in 2021.



<section-header>

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# **REASONS FOR COWS LEAVING THE HERD**

# Producers culled more cows selectively over the past year, with more cows leaving in their first three lactations – something which until this year hadn't really changed for two decades.

As in recent years, the overall rate of cows leaving the herd remained at 29%, but selective culls made up 32% of those leaving the herd compared with 30% last year. More than 52% of leavers left in their first three lactations, up from 49% last year – perhaps due to increased sales of freshly-calved heifers to make the most of strong cow prices this year. The number of casualty or dead cows has dropped consistently, from 19% two years ago, to 18.4% last year and now 17.1%. This may be due to greater attention to management detail, with health monitoring systems picking up inactive cows sooner before they become too ill to recover fully.

#### PROPORTION OF COWS LEAVING THE HERD – FORCED VS SELECTED





COWS LEAVING HERD BY HERD SIZE BAND (CULLING RATE)





As in previous years, poor fertility remained the primary reason for cows leaving the herd, accounting for 25.1% of culls – although this was down from 26.8% last year. Mastitis again ranked second, but lameness reasons jumped from 5.9% last year to 7.6% this year – perhaps due to greater awareness through mobility scoring. Johne's disease – which ranked third last year, dropped to fourth at 6.8%, possibly due to herds starting to get Johne's under control.

The culling rate based on yield level remained similar to last year, with those in the 7,000 to 8,000 litres bracket culling the least, at 22.7% and those over 10,000 litres culling the most, at 32.3%. Culls based on herd size looked more closely matched than last year, within a range of 24.9% and 30.8% this year, compared to 25.2% and 32.2% last year.

# ORGANIC UPDATE

# Organic yields reached a record high in 2020/2021, at 6,847 litres/cow – 296 litres up on 2011 and 780 litres above 2001. Yields from forage were at their highest level since 2012, at 3,288 litres/cow, with 48% of all yield from forage – the second highest amount since 2005.

As with conventional herds, butterfat was at a record high this year, at 4.12%, with milk solids at a corresponding high of 507kg. Milk prices have fallen sharply over the past two years, from 39.42p/litre to 37.57p. However, that is still 6.92p/litre higher than in 2011 and 17.05p/litre up on 2001.

Purchased feed costs reached their second highest level since 2000, at £697/cow, and despite producers feeding similar amounts of concentrates since 2007 (and yields being at a high) feed costs on a per litre basis remained the third highest in 21 years at 10.18p/litre.



Bactoscans and cell counts dropped to 24 and 176,000, respectively, both the lowest in 20 years.

Margin over purchased feed has increased marginally over the past three years, with higher yields offsetting the lower milk prices. Naturally, this means that on a per litre basis margins have contracted, down from 29.26p/litre in 2015 to 27.39p this year.

More indepth analysis by yield can be found on page 6.

ANNOAL KOLLING KLJOLIJ					
Holstein/Friesian, Organic Herds (comparing matched herds)		Year Ending March 2020	Year Ending March 2021	Difference	% Change
Cows in herd		230	222	-8	-3.5%
Stocking rate	cows/ha	1.67	1.69	0.02	1.2%
MILK PRODUCTION					
Yield per cow	litres	6,601	6,847	246	3.7%
Yield from all forage per cow	litres	3,220	3,288	68	2.1%
Butterfat	%	4.10	4.12	0.02	0.5%
Protein	%	3.36	3.31	-0.05	-1.5%
Cellcount		179	176	-3	-1.7%
Milk Price	pence	38.33	37.57	-0.76	-2.0%
FEED					
Concentrate use per cow	kg	1,687	1,777	90	5.3%
Concentrate use per litre	kg	0.26	0.26	0.00	0.0%
Concentrate price per tonne	£	394	388	-6	-1.5%
Other purchased feed cost per cow	£	9	9	0	0.0%
Total purchased feed cost per cow	£	674	698	24	3.6%
Total purchased feed cost per litre	pence	10.21	10.19	-0.02	-0.2%
All P.Feed @ 86% DM equiv. per cow	kg	1,717	1,804	87	5.1%
MARGINS					
MOPF per cow	£	1,856	1,874	18	1.0%
MOPF per litre	pence	28.12	27.37	-0.75	-2.7%





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# CHANNEL ISLAND UPDATE

Channel Island producers have had a pretty stable year, with production, feed costs and returns remaining relatively unchanged on last year.

ANNUAL ROLLING RESULTS						
Channel Island, Conventional Her (comparing matched herds)	'ds	Year Ending March 2020	Year Ending March 2021	Difference	% Change	
Cows in herd		193	215	22	11.4%	
Stocking rate	cows/ha	2.56	2.50	-0.06	-2.3%	
MILK PRODUCTION						
Yield per cow	litres	6,243	6,140	-103	-1.6%	
Yield from all forage per cow	litres	2,420	2,334	-86	-3.6%	
Butterfat	%	5.35	5.36	0.01	0.2%	
Protein	%	3.82	3.81	-0.01	-0.3%	
Milk solids	kg/cow	576	570	-6	-1.0%	
Milk Price	pence	35.45	35.73	0.28	0.8%	
FEED						
Concentrate use per cow	kg	2,055	2,013	-42	-2.0%	
Concentrate use per litre	kg	0.33	0.33	0.00	0.0%	
Concentrate price per tonne	£	256	259	3	1.2%	
Other purchased feed cost per cow	£	68	91	23	33.8%	
Total purchased feed cost per cow	£	594	612	18	3.0%	
Total purchased feed cost per litre	pence	9.51	9.97	0.46	4.8%	
All P.Feed @ 86% DM equiv. per cow	kg	2,299	2,288	-11	-0.5%	
MARGINS						
MOPF per cow	£	1,619	1,582	-37	-2.3%	
MOPF per litre	pence	25.93	25.77	-0.16	-0.6%	

The biggest change has been the increase in herd size, perhaps due to the smaller sample compared to conventional herds from 193 to 215 cows. However, stocking rates have dropped very slightly, implying that any herds which have grown have taken on additional land in order to do so.

Overall yields declined by 1.6%, to average 6,140 litres/cow, with milk from forage dropping by 3.6% to 2,334 litres - perhaps due to the drier summer impacting grazing. However, producers didn't compensate for this by increasing concentrates - in fact, they fed slightly less, at 2,013kg per cow. This may be because concentrate prices were marginally up, year-onyear, although producers did pay significantly more for other feed costs, perhaps to maintain milk quality.

Milk quality remained virtually unchanged, with butterfat at 5.36% and protein at 3.81%. As a result, milk prices (most of which will be constituent based) were also stable, at 35.73p/litre, 0.28p/litre up on the year.

Given the slightly lower yields and higher input costs, margins therefore narrowed slightly, to £1,582 per cow or 25.77p/litre.

# CROSSBRED HERDS UPDATE

# The growing number of crossbred herds in the UK means that we have been able to produce a crossbreed comparison for the first time this year, with some interesting results.

Although herd size eased marginally on the year, to 226 cows, stocking rates increased from 2.54 cows/ha to 2.64 - possibly reflecting the growing number of farmers adopting intensive rotationally grazing practices to maximise production from grass.

Milk from forage increased by 9.8%, to 3,373 litres/cow, comprising nearly half of the total production of 6,891 litres. Despite this, milk quality remained high, at 4.45% butterfat and 3.52% protein.

Milk prices increased slightly on the year, to 29.76p/litre, and producers also managed to reduce purchased feed costs by feeding 3.9% fewer concentrates per cow, at 1,790 kg/cow. Overall, they reduced all purchased feed inputs at 86% dry matter equivalent by 4.4%, to 1,881kg/cow.

As a result, MOPF increased on both a per cow and per litre basis, to £1,604 and 23.28p/litre, respectively.

ANNUAL ROLLING RESULTS					
Crossbreeds, Conventional Herds (comparing matched herds)		Year Ending March 2020	Year Ending March 2021	Difference	% Change
Cows in herd		233	226	-7	-3.0%
Stocking rate	cows/ha	2.54	2.64	0.10	3.9%
MILK PRODUCTION					
Yield per cow	litres	6,831	6,891	60	0.9%
Yield from all forage per cow	litres	3,073	3,373	300	9.8%
Butterfat	%	4.38	4.45	0.07	1.6%
Protein	%	3.52	3.52	0.00	0.0%
Milk Price	pence	29.64	29.76	0.12	0.4%
FEED					
Concentrate use per cow	kg	1,863	1,790	-73	-3.9%
Concentrate use per litre	kg	0.27	0.26	-0.01	-3.7%
Concentrate price per tonne	£	230	239	9	3.9%
Other purchased feed cost per cow	£	24	19	-5	-20.8%
Total purchased feed cost per cow	£	452	447	-5	-1.1%
Total purchased feed cost per litre	pence	6.62	6.49	-0.13	-2.0%
All P.Feed @ 86% DM equiv. per cow	kg	1,967	1,881	-86	-4.4%
MARGINS					
MOPF per cow	£	1,573	1,604	31	2.0%
MOPF per litre	pence	23.03	23.28	0.25	1.1%



## MEET THE TEAM

During the past year the whole Kingshay team has pulled together to help maintain an efficient dairy costings service. A special thank you goes to Emily, Lara and Lily who were still going into the Kingshay office to do the Dairy Manager post.



#### 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.



#### MARY-KATE MAHONY Farm Services Specialist

Mary-Kate 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 earlier this year and also helps out analysing Antimicrobial data.



#### 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.



#### **SIMON WITHERS**

Business Development Manager

Simon joined Kingshay in October 2020 taking on a new strategic role as a Business Development Manager. The role will be a key member of the Kingshay leadership team, initially focussed on supporting existing customers and developing further sales within our Dairy Manager costings service, alongside supporting activities at the Dairy Centre.



#### LILY HOWARD Service Support & Marketing Coordinator

Lily joined Kingshay in 2019 and manages Kingshay's social media sites along with designing fliers, leaflets and reports. She also manages FarmIQ, an online learning platform with a variety of agricultural courses available. When other areas of the business require additional support, she is on hand to help.



#### **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 over 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.



#### FELICITY GALE

Farm Services Specialist (On Maternity Leave)

Felicity will be returning to work later this year and will play a key part within the services team. She joined the team in 2013 and analyses production results and industry trends for key clients.



## HAYLEY TINCKNELL

Farm Services Specialist (On Maternity Leave)

Hayley joined the team at the start of 2018 as one of the main contacts for the costings service, including answering queries and providing technical analysis. Alongside the rest of the team, she also assists with the smooth running of the costings service and regularly analyses data for clients.



INDEPENDENT DAIRY SPECIALISTS

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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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