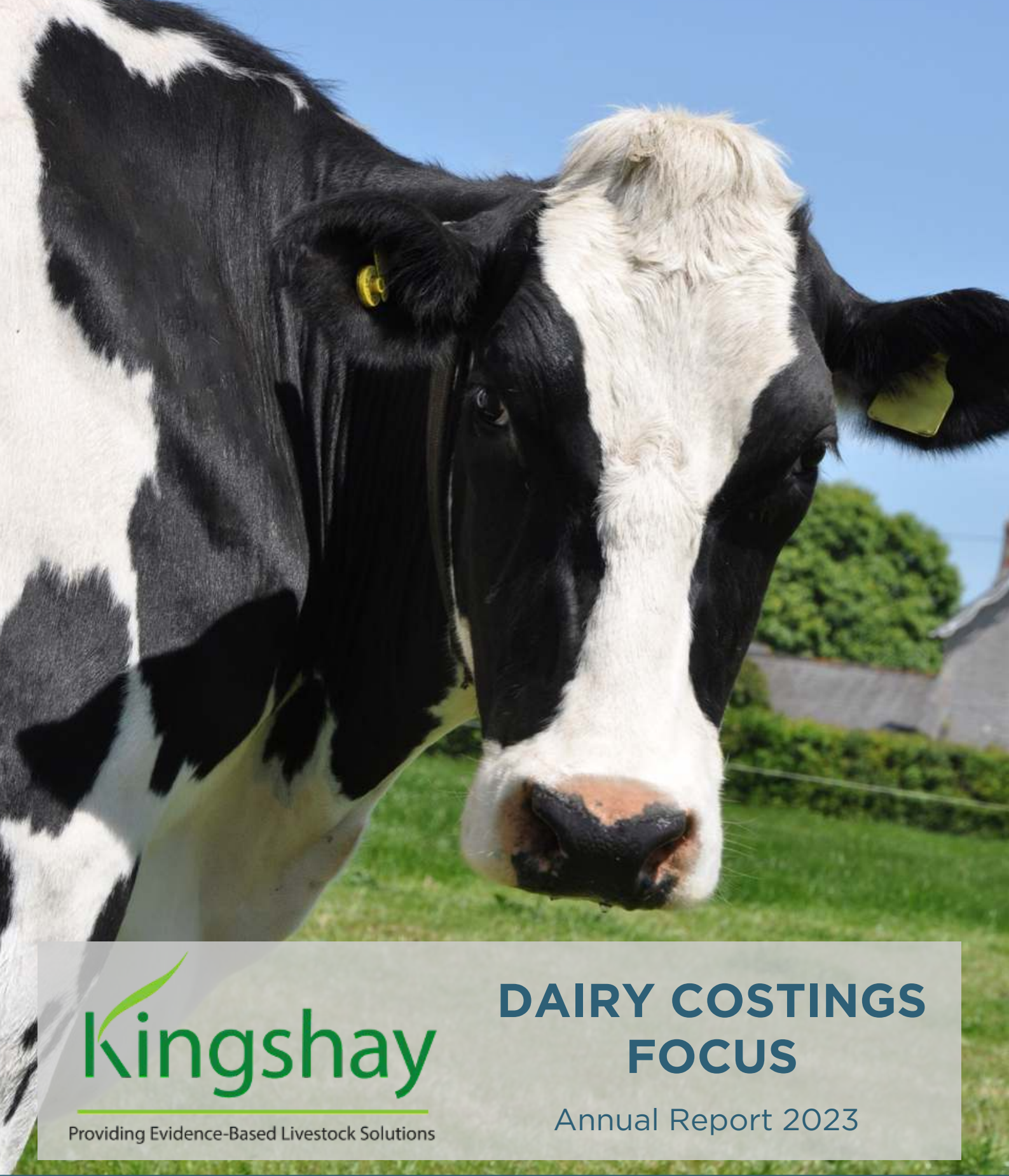

Kingshay

Providing Evidence-Based Livestock Solutions

DAIRY COSTINGS FOCUS

Annual Report 2023

IN THIS REPORT:

- PRODUCTION SYSTEMS
- MILK PRICE & INPUT COSTS ANALYSIS
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WELCOME

The 12th edition of our Dairy Costings Focus Report draws on data from 978 conventional herds and 83 organic herds. Data is analysed and split in various ways with comparisons to other similar herds. In this report, we look at trends in margin over purchased feed, feed efficiency and herd health & fertility over the past 12 months from herds using our dairy costings service. We have also included a new section on Heifer Trends on page 18.

For many dairy producers, the challenge has been to maintain herd performance to maximise returns from a good milk price and not let efficiency slip. During the summer of 2022, a prolonged hot dry spell meant digging into winter rations to keep milk yields up for many herds in much of England and Wales. Rising milk prices have tracked rising input costs but are coming back down at a much faster rate than they went up – when will we see the bottom of the milk price trough and how low will it go?

At Kingshay we focus on evidence-based livestock solutions with accurate data to assess key trends. Our **Dairy Manager costings service** is a key part of what we do and has a range of service levels from level 1 (margin over purchased feed focussed) right through to Level 4 (costs of production) as well as a comprehensive analysis of antimicrobial usage for those herds that want to independently compare their results.

Producers will need to closely monitor their costs of production over the next 12 months to assess the impact of stubbornly high input costs, with accurate budgets being essential for planning cash flow. However, margin over purchased feed dairy costings continue to be a key way to easily monitor production, feed efficiency and feed costs along with milk quality & price each month, with comparisons to other similar herds.

Report authors – Kathryn Rowland and Agri-hub

For more information on Kingshay and our Dairy Manager costings service visit www.kingshay.com. Call 01458 851555 or email dairy.manager@kingshay.co.uk to find out how we can help your business.

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INTRODUCTION

Well if we thought 2021-2022 was volatile, we were in for a further shock in 2022-23! Record high prices for almost everything, from milk price to fertiliser, and concentrates to fuel, combined with an exceptionally dry summer which impacted forage production.

Producers did an excellent job, and margins reached highs across the board – although the gap between the top and average performers widened further, showing the importance of attention to detail and focus on efficiencies.

Looking at the 10-year trends (see page 4), herd size continues to grow, but yields have slightly stagnated since 2020, perhaps as producers look to improve herd health and reduce cow stress rather than focusing on production alone. Milk prices have increased by 61% over the past decade, reaching an average of 50.98p/litre in December 2022 (see page 7). However, since then markets have dropped sharply, losing more in the first half of 2023 than they gained in the second half of 2022. The gap between the top and bottom 10% of prices reached a peak differential of 16.2p/litre in February, with producers in Scotland suffering the worst prices on a regional basis.

The hot, dry summer meant that milk from forage dropped back (see pages 8/9) – although some organic and top performing conventional herds managed to buck that trend. As a result, concentrate usage increased – but with record high concentrate prices, producers also looked to alternative feeds to try and curb input costs. The hot weather also impacted fertility as cows didn't display such obvious oestrus cycles. As a result, days to first service increased from 69 to 75 days, and given the high milk price, the cost of each day of extended calving interval increased to £5.89/day per cow (see page 19).

Comparing production systems (see page 6), year-round housed herds again produced the greatest margin per cow, with low to moderate yielding organic herds leading on a per-litre basis. However, the gap between the top and bottom quartile of those within the same systems widened again, showing the potential to improve performance within an existing system rather than switching to a different alternative.

TRENDS OVER THE PAST 10 YEARS

When analysing 10-year trends there are always some obvious shifts, and herd size is often one of them. As might be expected, herd size has grown over the past 10 years, by 23%.

That hides a dip seen from 2019 to 2021, when herd size contracted, with flying herds not restocking due to high heifer prices. But since 2021, herd size has recovered its long-term trend, rising from an average of 201 cows to 217.

Yields have also increased over the past decade, by 10%. But taken over a slightly shorter period, they have rather stagnated, remaining around the 8,400 to 8,450 litres per cow mark since 2020. This could be due to a reduced focus on production alone, with a shift towards focusing on efficiencies and margins. Not everyone is pushing to breach the 10,000 litres per cow threshold, with many producers looking to improve herd health and reduce cow stress, as well as focusing more on milk from grazed grass.

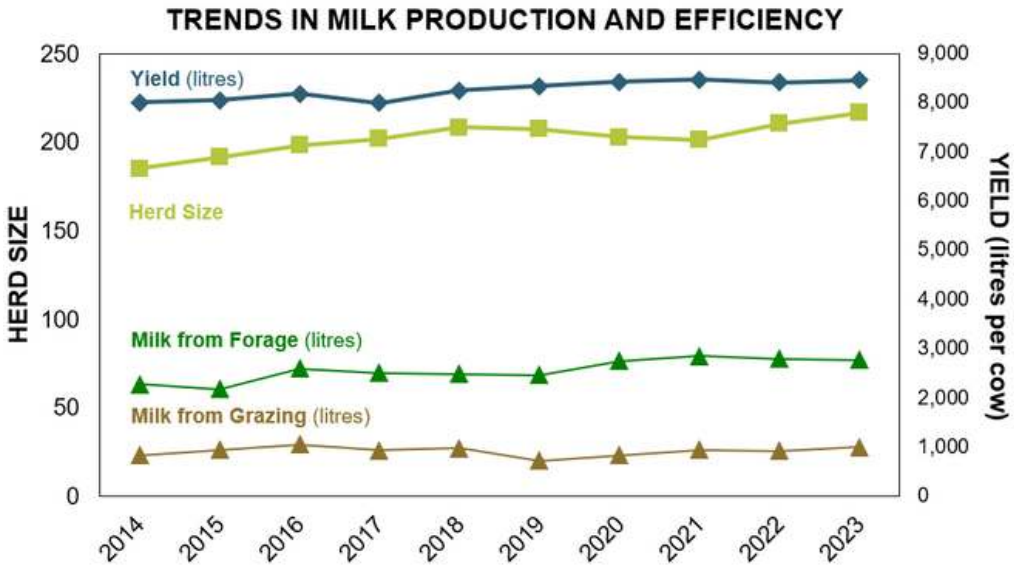
Herds using Kingshay's dairy costings service may also contain a higher proportion of grazing systems than herds recorded by other consultants, so, again, are less likely to be milking for yield alone. Their focus may be more on margin per litre than margin per cow (or both).

Milk from forage and from grazing have also remained relatively static since 2020, but taken over 10 years they have grown by 31% and 9%, respectively. At the same time, concentrate use per cow has grown by 12%, with prices up by a whopping 46% to a record high of £357/t (rolling 12-month average). As a result, total purchased feed costs have jumped by 58% per cow and 44% per litre of milk produced.

ANNUAL ROLLING RESULTS

Holstein/Friesian, Conventional Herds		Year Ending Mar 2003	Year Ending Mar 2013	Year Ending Mar 2023	Difference 10 years ago	% Change
Cows in herd		128	176	217	41	23.3%
Stocking rate	cows/ha	2.14	2.23	2.33	0.10	4.5%
MILK PRODUCTION						
Yield per cow	litres	7,122	7,676	8,458	782	10.2%
Yield from all forage per cow	litres	2,651	2,113	2,776	663	31.4%
Yield from grazed forage per cow	litres	1,061	910	995	85	9.3%
% of total yield from forage		37%	28%	33%	5%	19.3%
Milk Price	pence	17.06	28.66	46.18	17.52	61.1%
Total milk value per cow	£	1,215	2,200	3,906	1,706	77.5%
Milk price : conc. price ratio		1.33	1.17	1.29	0.12	10.1%
FEED						
Concentrate use per cow	kg	2,003	2,406	2,690	284	11.8%
Concentrate use per litre	kg	0.28	0.31	0.32	0.01	3.2%
Concentrate price per tonne	£	128	244	357	113	46.3%
Other purchased feed cost per cow	£	19	71	81	10	14.1%
Total purchased feed cost per cow	£	275	658	1041	383	58.2%
Total purchased feed cost per litre	pence	3.86	8.57	12.31	3.74	43.6%
All P.Feed @ 86% DM equiv. per cow	kg	2,208	2,710	2,926	216	8.0%
MARGINS						
MOPF per cow	**£**	**940**	**1,542**	**2,865**	**1,323**	**85.8%**
MOPF per litre	pence	13.20	20.09	33.87	13.78	68.6%

Thankfully, the milk price has increased by 61% over the same period – also to a record high – meaning the milk price:feed price ratio has widened by 10%, to 1.33. The larger the ratio, the better it is for farmers – and last year was the highest it had been since 2018. That said, the milk price also has to cover other variable and overhead costs, which have also increased over the past decade.



All in all, the 10-year trend looks extremely positive when it comes to the bottom line. The average margin over purchased feed improved by 86% on a per cow basis, and 69% on a per litre basis, to £2,865 and 33.87ppl, respectively – their highest levels since Kingshay first started the costings service back in 1998.

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Department for Environment Food & Rural Affairs

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PRODUCTION SYSTEMS

The 2021/22 milk year saw a widening in the gap between the top and bottom quartile of nearly all types of milk production system, due to rising feed costs and variations in milk price. It is unsurprising, therefore, that this was exacerbated during the 2022/23 milk year.

The average gap in margin over purchased feed per litre for the top and bottom quartile of grazing-based herds (for whom this is the most suitable key performance indicator) widened from 8.7p/litre last year to 12.9p/litre. In the mainly housed herds, which would focus on margins per cow, the gap widened from £705/cow to £980/cow.

When comparing one system to another, the difference between the top and bottom system widened from £517/cow last year to £1,156/cow, while the per-litre gap actually narrowed, from 7.76p/litre to 6.56p/litre. However, the same systems topped the margin rankings as last year, with year-round housed herds producing the greatest margin per cow, and low to moderate yielding organic herds leading on a pence per-litre basis.

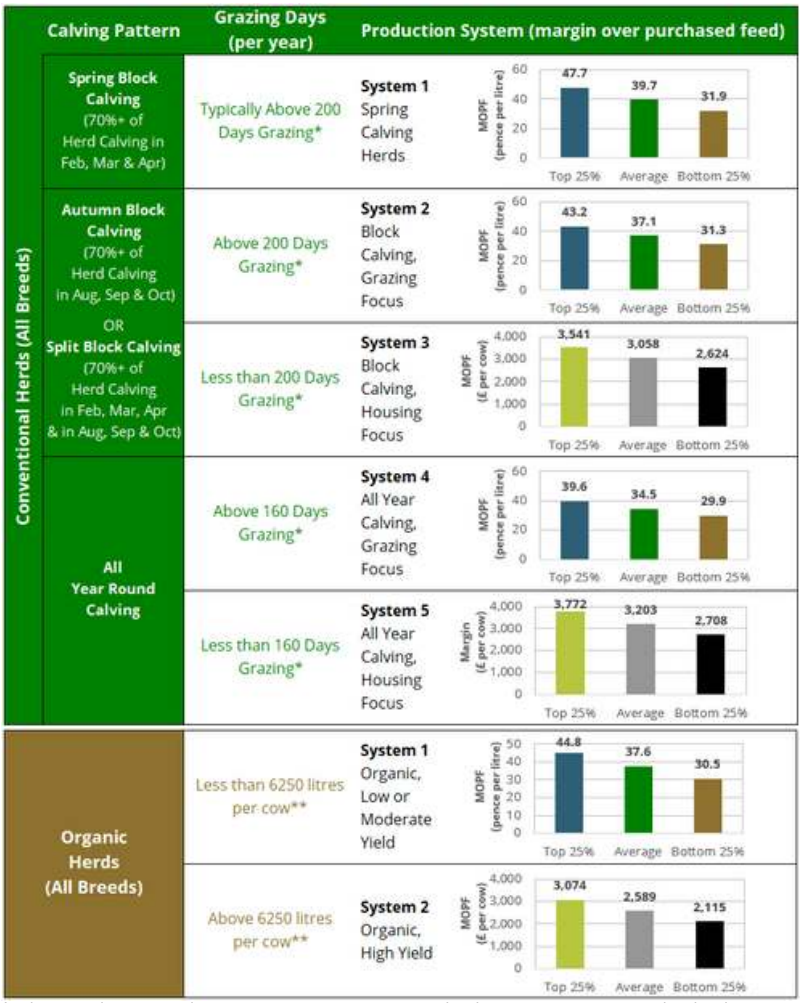
ANNUAL RESULTS - YEAR END MARCH 2023		CONVENTIONAL HERDS					ORGANIC HERDS	
		System 1: Spring Calving Herds	System 2: Block Calving Herds (Grazing Focus)	System 3: Block Calving Herds (Housing Focus)	System 4: All Year Round Calving (Grazing Focus)	System 5: All Year Round Calving (Housing Focus)	System 1: Low / Moderate Yield	System 2: High Yield
Cows in herd		206	203	222	169	256	242	215
Stocking rate	cows/ha	2.62	2.35	2.20	2.26	2.45	2.08	1.70
Culling rate (%)		24%	24%	27%	25%	30%	28%	32%
MILK PRODUCTION								
Yield per cow	litres	5,631	6,697	8,712	6,790	9,663	5,444	7,459
Yield from all forage per cow	litres	3,008	2,933	3,219	2,584	2,668	2,946	3,302
Yield from grazed forage per cow	litres	1,964	1,307	768	1,147	101	1,944	1,494
Number of days grazing	days	265	243	169	217	134	244	239
% of total yield from forage		53%	44%	37%	38%	28%	54%	44%
Milk solids (kg per cow)		452	540	675	544	746	423	553
Milk Price	pence	48.25	48.01	46.96	46.22	46.20	50.76	50.17
Milk Price to Feed Price Ratio		1.41	1.31	1.30	1.28	1.31	0.93	0.91
MARGIN OVER PURCHASED FEED (MOPF)								
MOPF per cow	£	2,236	2,486	3,058	2,342	3,203	2,047	2,589
MOPF per litre	pence	39.71	37.12	35.10	34.49	33.15	37.60	34.71

Higher yielding herds unsurprisingly had higher culling rates than their lower-yielding counterparts, with high yielding organic systems once again having the highest rate, and block calving grazed herds sharing the lowest with spring calving herds.

Milk prices increased across the board, as did concentrate prices – although as discussed on page 21 (organic herd analysis), organic milk prices did not increase by the same margin as conventional values. This meant that, while the milk price: feed price ratio increased for all conventional systems, year-on-year, it remained virtually unchanged for both types of organic system.

While it can be tempting to compare systems and say one is more profitable than another, that doesn't take into account individual farm circumstances, infrastructure, business strategy or personal aspirations. There is more potential to improve performance within your current system – by benchmarking your own farm against your peers – than by switching to a different alternative system.

How does your herd compare?



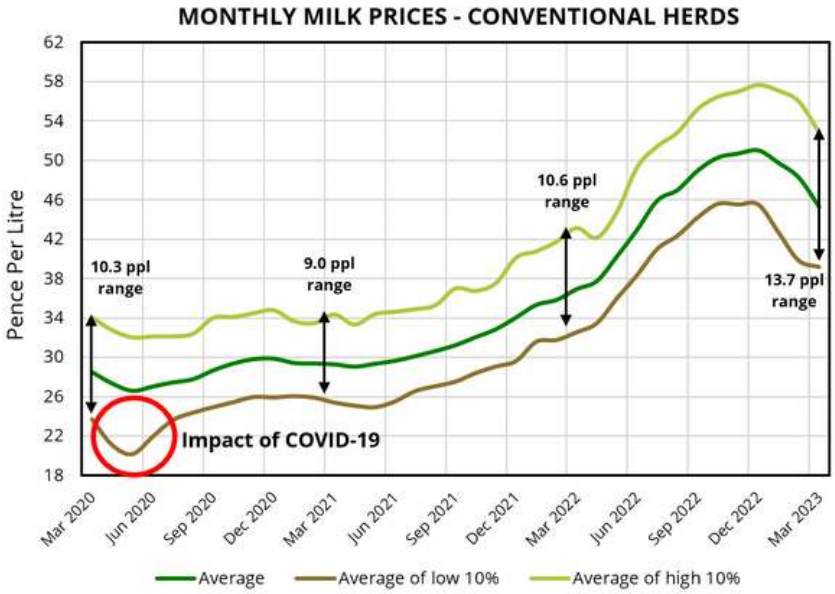
* Where you have more than one grazing group, use a weighted average. e.g. A 250 cow herd with 150 high yielders grazing for 170 days a year and 100 lower yielders grazing for 220 days then:
(150 cows x 170 days) + (100 cows x 220 days) = 47,500 grazing days.
47,500 days / 250 cows = an average of 202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

MILK PRICE ANALYSIS

The past year has been an absolute roller-coaster when it comes to milk prices. Tight global supply and demand led to soaring commodity values from April 2022 until the end of the year, with the average UK farmgate price rising from 37.71p/litre to 50.98p/litre between April and December.

The turn of the year, however, also led to a turn in the markets, and values in the first half of 2023 lost more than they had gained in the second half of 2022 (based on AHDB figures).

It is interesting to note that both the top 10% and bottom 10% of milk contracts increased by a similar proportion – 37% and 36%, respectively, between April and December – although in pence per litre terms, the highest 10% won out, rising by 15.53p/litre versus the bottom 10% at 12.11p/litre. On the way back down, the top 10% lost 4.83p/litre (8%) between December and March, with the bottom losing 6.32p/litre (14%).



Much of this has to do with the difference between aligned and non-aligned contracts, with several manufacturers introducing A and B pricing, which will also have had an effect. What it does mean is that the difference between the top and bottom 10% has widened from 10.6p/litre in March 2022 to 13.7p/litre in March 2023 – although it reached a peak differential of 16.2p/litre in February.

Best Vs Lowest Milk Price Contracts - Calculated based on a level supply

Year ending		Mar 18	Mar 19	Mar 20	Mar 21	Mar 22	Mar 23
Top	ppl	31.79	32.97	33.52	32.80	40.55	52.95
Bottom	ppl	24.93	26.37	25.08	25.34	33.81	37.49
Difference	ppl	6.86	6.60	8.44	7.46	6.74	15.46

Source: AHDB Dairy

Looking ahead, there are some signs of stability returning in the medium-term, with a slight uptick in global commodity prices and a smaller spring flush than expected. However, few suppliers will have the luxury of changing contracts to higher-priced alternatives, so the key remains to maximise the price available on each individual contract by producing to its requirements.

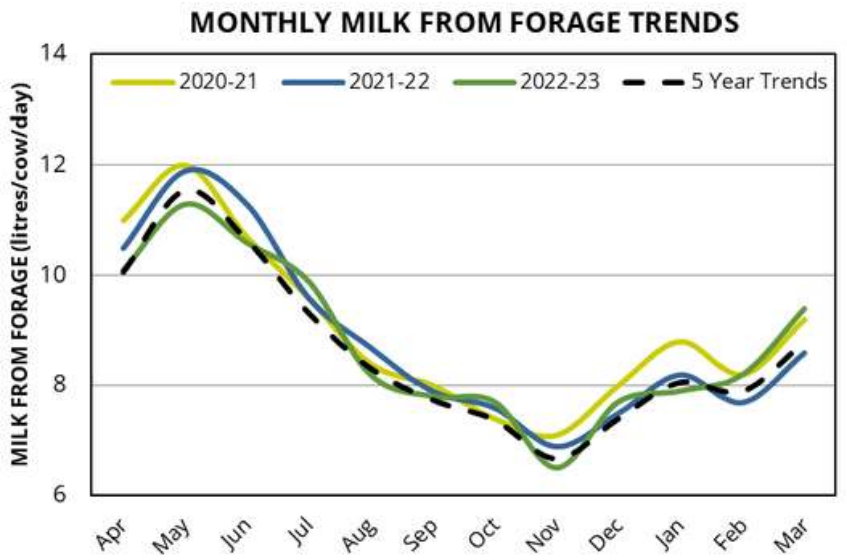
MILK FROM FORAGE

The top Kingshay costed dairy herds (ranked by milk from forage) have managed to sustain milk from forage over the past 12 months, despite challenging growing conditions last summer.

Record temperatures and extended dry periods during the summer of 2022 limited grass growth and reduced winter forage stocks. Across all herds, this challenged average milk yields from forage, at 2,776 litres/cow for the 12-month period to March 2023, compared with 2,801 litres/cow a year earlier.

But within these figures there is a high degree of variation. The top 25% of Kingshay costed herds (see table opposite) managed to maintain yields from forage at 3,987 litres/cow, compared with 3,983 litres under better growing conditions the year before.

The upper quartile also reduced concentrate use, albeit only slightly, at 2,280kg/cow compared with 2,289kg the year previously. In contrast, the bottom 25% of producers used almost a tonne (917kg) more concentrate per cow than their higher performing counterparts, at 3,197kg fed over the 12 months. With this marked dependence on concentrates, yield from forage for the bottom 25% was far lower than the top-end producers, with only 1,429 litres/cow produced. However, overall milk yields for the bottom 25%, at 8,642 litres/cow, were higher than the top quarter, which averaged 8,570 litres/cow. Both were above the average production level of 8,458 litres/cow.



Milk from forage has always been a key indicator of feed efficiency, particularly important at the moment as the milk price to feed price ratio worsens. Looking at potential milk from forage targets, for all herds (apart from the highest yielding herds - yielding over 10,000 litres / cow) an average target milk from forage of 3,000 litres per cow is a good guide. This will depend on stocking rates though; herds with a higher stocking rate would need to lower their expectation of milk from forage per cow, and/or use milk from forage per hectare as their KPI.

How is Milk from Forage Calculated?

Milk from forage is the energy to produce the milk litres (adjusted for butterfat & protein) minus the energy supplied from purchased feeds, including any bulk or moist feeds. The remaining energy is assumed to be produced from forage (both conserved & grazed), and divided by the energy per litre to give the litres of milk from forage.

Calculation:

MJ energy within total milk produced

\-

MJ energy from purchased feeds (including bulk feeds and supplements)

=

MJ energy from all forages

$$\frac{\text{MJ energy from all forages}}{\text{MJ energy / litre}} = \text{Litres of milk from forage}$$

For this calculation to be accurate, check the energy values of any compounds or blends selected. Be wary of figures quoted elsewhere which may not have an appropriate level of accuracy. For the majority of herds milk from forage is an excellent key performance indicator (KPI). Contact the Kingshay Dairy Manager Team to learn more.

MILK FROM FORAGE (Continued)

Despite the higher bought-in feed costs, when combined with record milk prices the increased output among the lower end of producers helped to narrow the gap in margins over purchased feed (MOPF).

The top 25% achieved a margin of £3,109/cow and 36.28p/litre. By comparison, herds achieving the lowest milk from forage averaged a margin of £2,673/cow and 30.94p/litre. The average bracket saw MOPF figures of £2,865/cow and 33.87p/litre. All far exceeded the previous year's MOPF figures, which were £1,920/cow and just 22.71p/litre.

ANNUAL RESULTS - YEAR END MARCH 2023 (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		195	203	217	247	198	211
Stocking rate	cows/ha	2.39	2.30	2.33	2.23	2.15	2.35
MILK PRODUCTION							
Yield per cow	litres	8,754	8,570	8,458	8,642	8,573	8,456
Yield from all forage per cow	litres	4,357	3,987	2,776	1,429	3,983	2,801
Milk Price	pence	46.45	46.51	46.18	45.59	32.33	32.05
FEED							
Concentrate use per cow	kg	2,191	2,280	2,690	3,197	2,289	2,667
Concentrate use per litre	kg	0.25	0.27	0.32	0.37	0.27	0.32
Concentrate price per tonne	£	367	364	357	352	277	274
Other purchased feed cost per cow	£	47	46	81	141	38	59
Total purchased feed cost per litre	pence	9.72	10.23	12.31	14.65	7.85	9.34
All P.Feed @ 86% DM equiv. per cow	kg	2,298	2,390	2,926	3,643	2,391	2,884
MARGINS							
MOPF per cow	£	3,216	3,109	2,865	2,673	2,098	1,920
MOPF per litre	pence	36.73	36.28	33.87	30.94	24.48	22.71

REGIONAL ANALYSIS

Margins vary between regions depending on feed, forage and climatic differences. Wales performed well on milk from forage in what was a hot, dry summer for many regions, curbing grazing and forage growth.

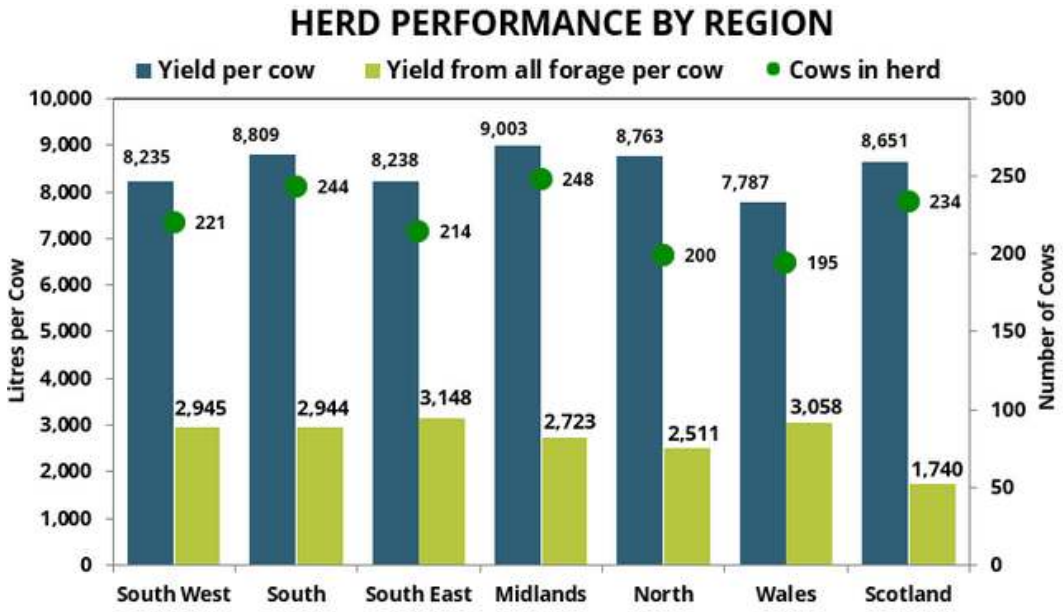
Even so, the South East came out best on a margin over purchased feed (MOPF) per litre basis, at 36.22p/litre. It was followed by the South West at 35.13p/litre. Bringing up the rear was Scotland, at 31.05p/litre.

While Scotland's milk price did rise for the year ending March 2023, averaging 45.19p/litre, it increased by less than elsewhere in the country – up 13.85p/litre versus other areas which saw gains of over 14p/litre. It was also the second lowest price behind Wales, which averaged 45.17p/litre. Leading the way on milk price was the South East, at 47.78p/litre, closely followed by the South West, at 47.27p/litre.

ANNUAL RESULTS - YEAR END MARCH 2023								
Holstein/Friesian, Conventional Herds		South West	South	South East	Midlands	North	Wales	Scotland
Cows in herd		221	244	214	248	200	195	234
Stocking rate	cows/ha	2.27	2.25	2.21	2.38	2.33	2.47	2.60
MILK PRODUCTION								
Yield per cow	litres	8,235	8,809	8,238	9,003	8,763	7,787	8,651
Yield from all forage per cow	litres	2,945	2,944	3,148	2,723	2,511	3,058	1,740
Milk Price	pence	47.27	46.40	47.78	45.76	46.07	45.17	45.19
Change on last year	pence	14.38	14.28	14.93	14.36	14.42	14.21	13.85
FEED								
Concentrate use per cow	kg	2,640	2,699	2,476	2,904	2,839	2,297	3,046
Concentrate use per litre	kg	0.32	0.31	0.30	0.32	0.32	0.29	0.35
Concentrate price per tonne	£	356	345	359	352	354	370	359
Other purchased feed cost per cow	£	59	133	65	92	109	51	131
Total purchased feed cost per cow	£	999	1064	953	1115	1115	900	1223
Total purchased feed cost per litre	pence	12.13	12.08	11.56	12.39	12.72	11.56	14.14
Change on last year	pence	3.04	3.10	2.53	3.01	3.17	2.80	3.39
MARGINS								
MOPF per cow	£	2,893	3,023	2,983	3,004	2,922	2,617	2,686
MOPF per litre	pence	35.13	34.32	36.22	33.37	33.35	33.61	31.05
Change on last year	pence	11.34	11.18	12.41	11.35	11.25	11.41	10.46

Worryingly, total purchased feed costs went up by 3.39p/litre, to 14.14p/litre in Scotland – partly due to increased feed use and partly due to higher prices. This is likely due to the number of housed and robot-milked herds in the area, given its inclement weather. The higher feed prices include haulage, which tends to involve longer distances in Scotland, so therefore had a greater impact on such systems. Yield from forage was also lower than in other regions, at 1,740 litres/cow.

At the other end of the scale in terms of purchased feed costs were Wales and the South West, at 11.56p/litre each, due to the greater production from forage (3,058 litres/cow and 2,945 litres/cow, respectively).



MILKING FREQUENCY

As expected, herd size increased across the board, although three-times-a-day milkers and robotic milkers grew much more markedly than twice-a-day milkers – up by 15%, 10% and 1%, respectively.

Yields also increased, year-on-year, across each system, although three-times-a-day and robotic milkers increased by a greater margin than twice-a-day milkers, up by 0.9%, 1.5% and 0.05%, respectively. This shows that robotic systems, in particular, are finding ways to boost production, while twice-a-day milkers are standing relatively still. Yields were again highest among the three-times-a-day milkers, at 10,647 litres/cow.

Milk from forage declined, regardless of the system, but twice-a-day milkers again achieved more from forage than the other systems, both of which are more likely to be fully housed.

To compensate for this decline, concentrate use per cow increased among twice-a-day and robotic milkers, although those milking three-times-a-day actually fed 45kg less this year. Instead, they fed a lot more other purchased feeds such as brewers' grains and moist/co-product feeds. Indeed, they spent more than three times as much on other purchased feeds, at £271/cow – probably because they are more likely to feed their own total mixed ration.

ANNUAL RESULTS - YEAR END MARCH 2023

Holstein/Friesian, Conventional Herds		Twice a day milking	Robotic milking	Three times a day milking
Cows in herd		204	202	520
Stocking rate	cows/ha	2.35	1.82	2.85
MILK PRODUCTION				
Yield per cow	litres	8,280	9,777	10,647
Yield from all forage per cow	litres	2,836	2,569	2,046
Milk Price	pence	46.21	46.28	46.19
FEED				
Concentrate use per cow	kg	2,602	3,452	3,553
Concentrate use per litre	kg	0.31	0.35	0.33
Concentrate price per tonne	£	358	357	340
Other purchased feed cost per cow	£	73	88	271
Total purchased feed cost per cow	£	1006	1320	1479
Total purchased feed cost per litre	pence	12.14	13.50	13.89
All P.Feed @ 86% DM equiv. per cow	kg	2,809	3,678	4,269
MARGINS				
MOPF per cow	£	2,820	3,205	3,439
MOPF per litre	pence	34.06	32.78	32.30

Total purchased feed costs were markedly higher on both a per-cow and per-litre basis. However, milk prices were markedly higher across the board than in the year to March 2022, with robotic milkers once again getting slightly more than the other systems. As a result, margin over purchased feed per cow increased by 49% for twice-a-day milkers, 52% for robotic milked systems, and 50% for three-times-a-day farms. On a per litre basis, margins increased by 49%, 50% and 49%, respectively.

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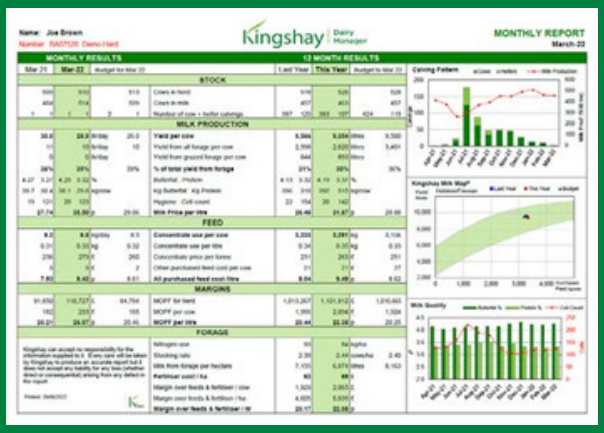
- Special Interest Group
- Annual Summary



REGULAR

Performance Reports

REVIEW MARGIN OVER PURCHASED FEED & FORAGE

- Longevity Report
- Calves, Culls & Replacements
- Annual Feed Summary
- Feed & Forage Report

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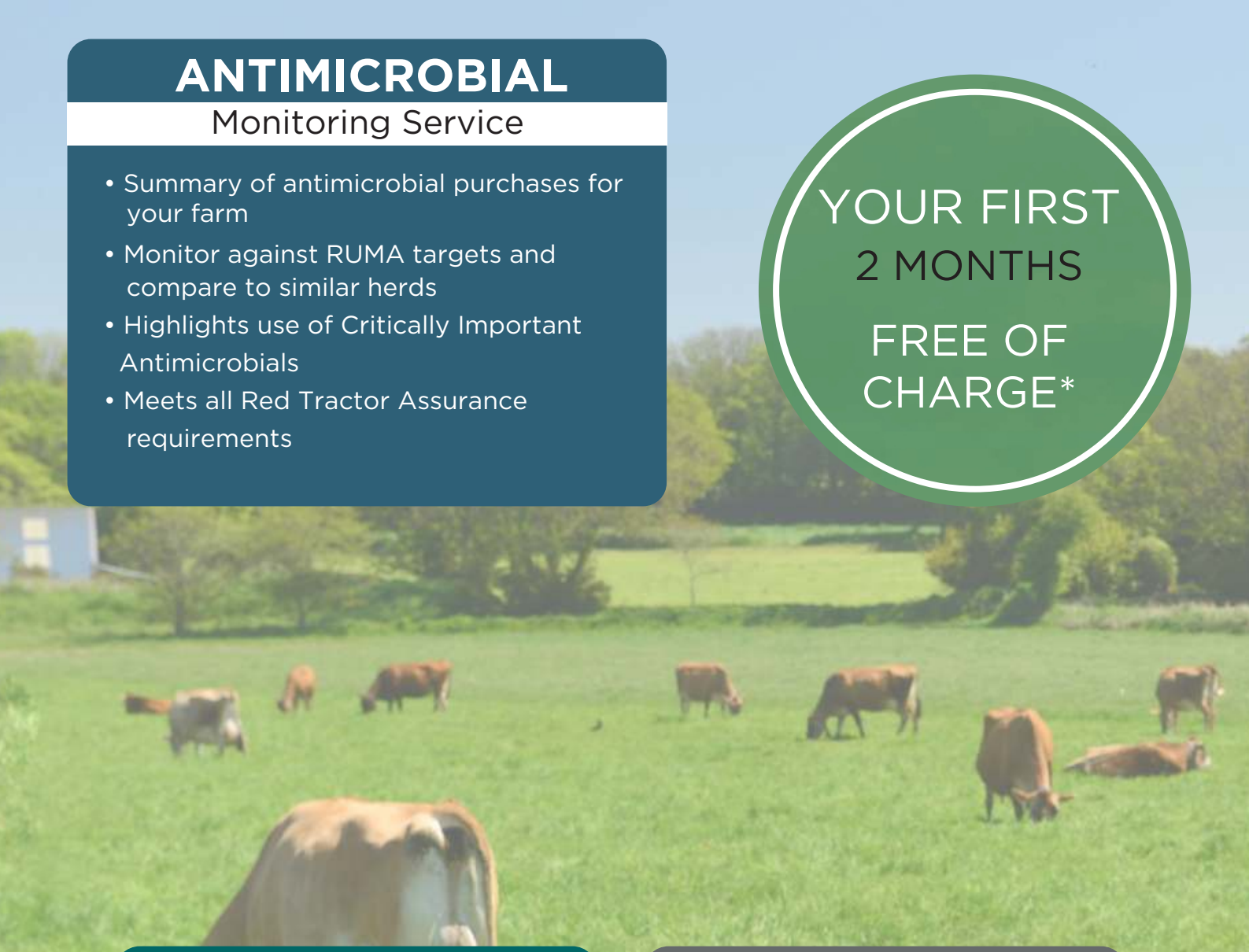

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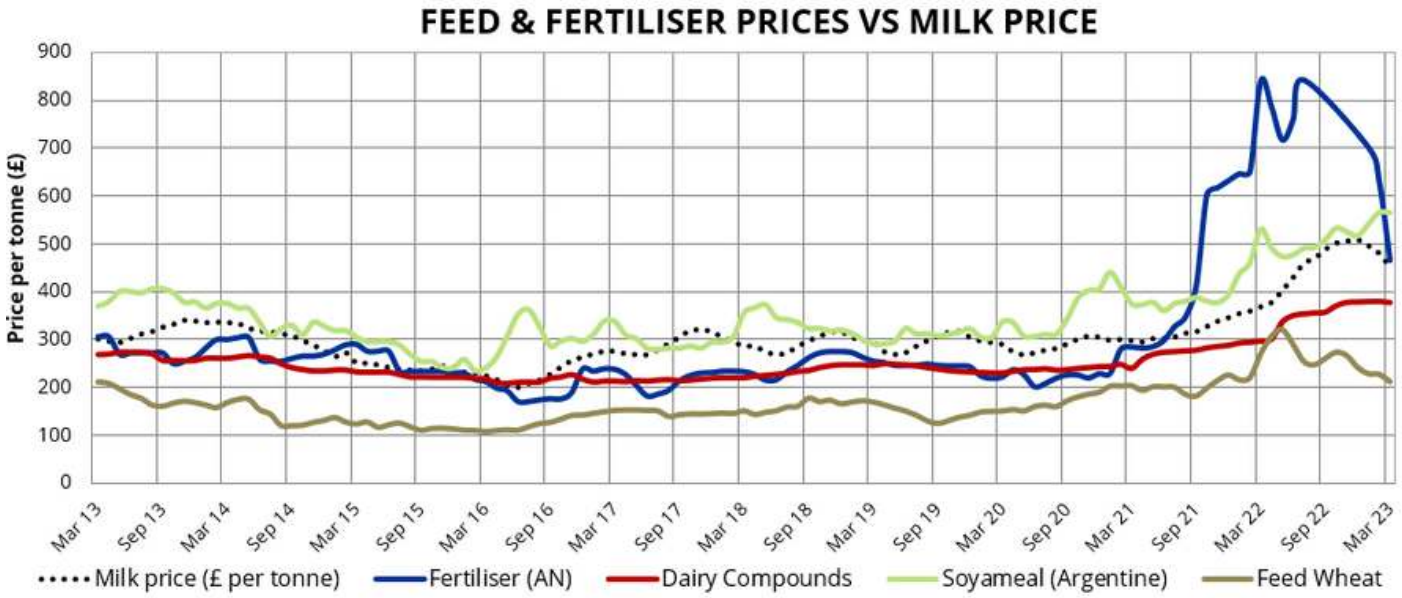
INPUT PRICE ANALYSIS

The war in Ukraine continues to hold up key input prices, despite significant falls from record highs in recent months for some categories.

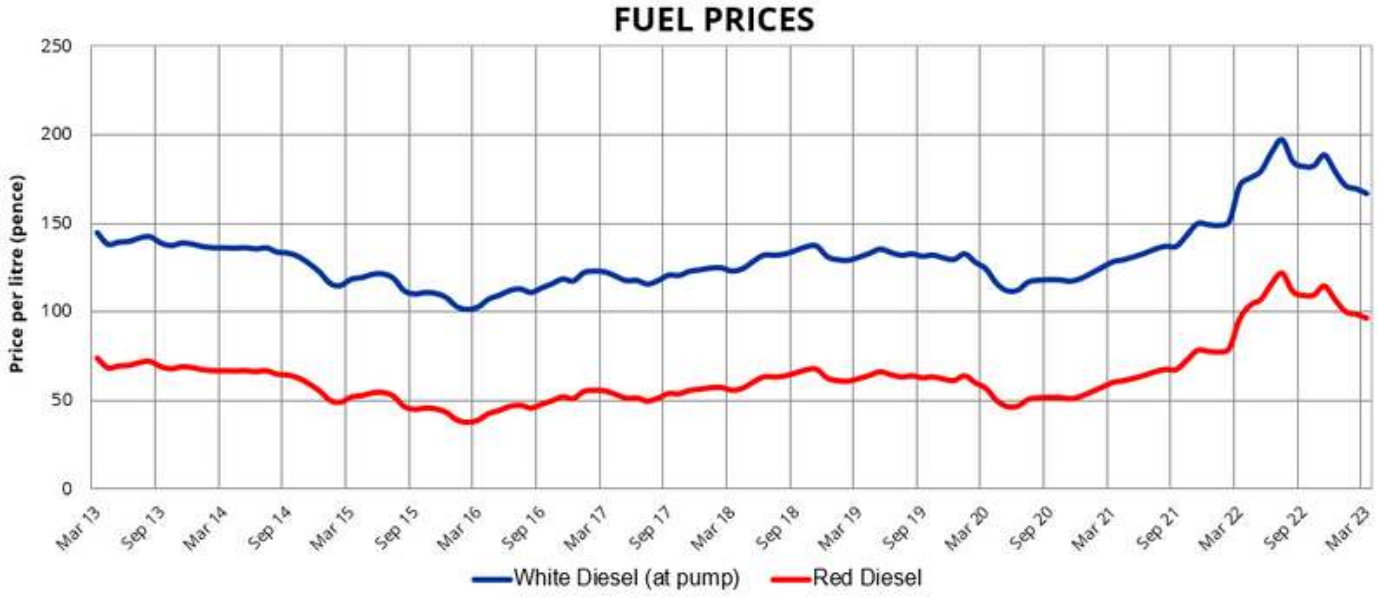
Up until Russia's invasion in February 2022, Ukraine had grown 10% of the world's wheat, 15% of its maize and 13% of global barley output. It was the fifth largest exporter of grains at 13.5m tonnes a year. The prolonged conflict has severely disrupted output, which is reflected in stubbornly high compound prices. At the end of March 2022, five weeks after the war began, compound values were already rising and stood at £296/t. Peak prices were seen in February, at £378/t - and despite grain trade agreements with the Kremlin, remained high one year on at £376/t in March 2023.

Within the compound costs, feed wheat peaked at £320/t, rapeseed meal hit highs of £423/t and soya reached £566/t. While soyameal was still at the record high in March 2023, and rapeseed had only eased to £352/t, wheat had dropped back to below pre-war prices at £212/t. With prices remaining high, dairy producers have considered alternative ration ingredients, particularly for protein, and pushed up stocking rates to make more milk from grass.

Fertiliser prices also rocketed. International trade sanctions on Russian gas, the key energy source for fertiliser production, restricted availability. Prices for UK fertiliser soared to a peak of £841/t before factories shut down in financial crisis. As gas prices eased, fertiliser costs halved to £465/t, but that figure is still close to double 2021 prices at the same stage of the year. The impact has prompted producers to review fertiliser usage, with many cutting back, increasing the use of soil testing and analysis to better target applications of fertiliser and organic manures.



Red and white diesel values were also forced up to record highs of 122p/litre and 197p/litre, respectively, in July 2022. Since then, prices have steadily declined, and by March 2023 were at 167p/litre for white diesel and 96p/litre for red diesel - still well above 151p/litre (white) and 79p/litre (red) immediately prior to the outbreak of the war.



MILK YIELD BANDS

Margin over purchased feed (MOPF) improved across all milk yield bands due to higher milk prices, although concentrate prices were up on the year along with nearly all other costs.

Milk prices were fairly similar between bands for the year ending March 2023. But as milk yield increased, there was a proportionate rise in concentrate use, as you would expect. That said, with herds yielding more than 10,000 litres concentrate prices, were lower than for other bands – at £342/t – likely due to higher yielding herds buying in greater bulk and using mixer wagons for mixing rations with straights feeds. The highest concentrate price paid was £363/t in the 7,000 to 8,000 litres band.

These figures are considerably higher than in 2022, when herds yielding more than 10,000 litres paid £270/t and 8,000 to 9,000 litre herds paid £276/t. These higher prices reflected the buoyant feed commodity markets last year.

Surprisingly, concentrate use did not change much, but the increased prices meant that total purchased feed costs for an 8,000 to 9,000 litre herd averaged 12.22p/litre compared with 9.96p/litre the previous year.

Margins have gone up on 2021/22 because of the increase in milk price. For a typical 8,000 to 9,000 litre herd the margin over purchased feed (MOPF) in 2022 was 23.02p/litre, compared with 34.19p/litre in 2023. However, producers had to cover higher costs including fertiliser, labour and electricity amongst others, which aren't reflected in the MOPF.

The lowest yielding herds (up to 6,000 litres per cow) achieved the biggest MOPF/litre, at 35.71p, while the highest yielding herds (over 10,000 litres) had the smallest at 32.68p.

As expected, MOPF per cow showed the opposite trend, with the highest yielding herds topping the table at £3,595/cow versus the lowest yielding at £1,851/cow.

ANNUAL RESULTS - YEAR END MARCH 2023							
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		142	161	173	210	242	314
Stocking rate	cows/ha	2.19	2.30	2.22	2.30	2.41	2.45
MILK PRODUCTION							
Yield per cow	litres	5,185	6,548	7,538	8,509	9,469	11,002
Yield from all forage per cow	litres	2,377	2,857	2,867	2,940	2,851	2,506
% of total yield from forage		46%	44%	38%	35%	30%	23%
Milk Price	pence	46.10	45.79	46.04	46.41	46.42	46.11
FEED							
Concentrate use per cow	kg	1,462	1,862	2,279	2,691	3,115	3,762
Concentrate use per litre	kg	0.28	0.28	0.30	0.32	0.33	0.34
Concentrate price per tonne	£	361	362	363	361	358	342
Other purchased feed cost per cow	£	11	24	46	69	95	190
Total purchased feed cost per cow	£	539	697	874	1040	1211	1478
Total purchased feed cost per litre	pence	10.39	10.65	11.60	12.22	12.78	13.43
All P.Feed @ 86% DM equiv. per cow	kg	1,507	1,950	2,424	2,880	3,391	4,275
MARGINS							
MOPF per cow	£	1,851	2,301	2,596	2,909	3,185	3,595
MOPF per litre	pence	35.71	35.14	34.45	34.19	33.64	32.68

HERD SIZE BANDS

Larger herds achieved higher yields than their smaller counterparts, with herd sizes over 400 cows averaging 9,693 litres, compared with those up to 100 cows averaging 7,523 litres.

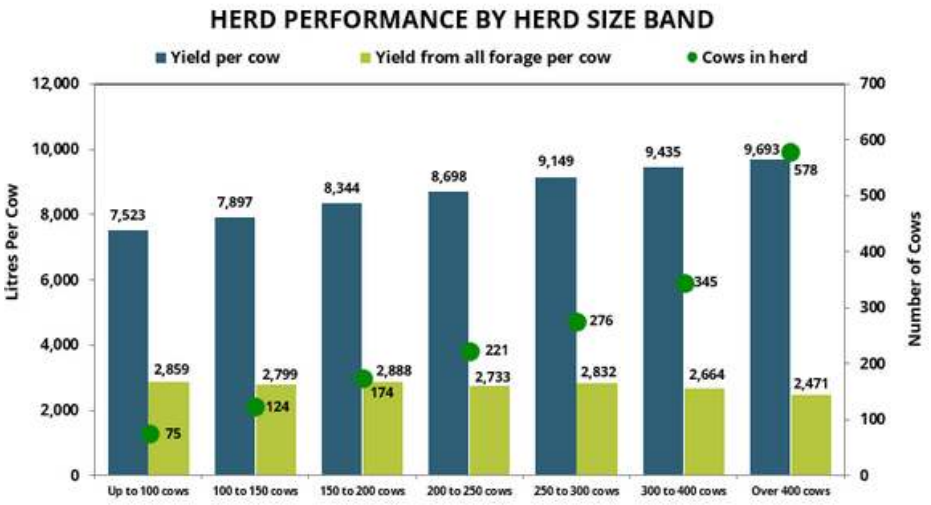
While larger herds managed to increase yields, year-on-year, yields fell for the up to 100-cow and 100-150 cow herds. In the former band they fell from 7,697 to 7,523 litres and in the latter from 7,986 to 7,897 litres. This average quite possibly included a larger proportion of grazing herds affected by the very dry summer.

The larger herds also achieved the highest milk prices for the year ending March 2023, at 47.16p/litre for herds with more than 400 cows and 47.12p/litre for the 300-400 cow band. This compares with 44.87p/litre for herds with less than 100 cows and is likely to reflect the larger herds capitalising on volume bonuses on their milk contract.

Herd sizes over 400 cows had the lowest concentrate price at £334/t. This is likely to be because they feed more of a total mixed ration and are using more straights than dairy compounds, buying larger volumes in bulk.

Total purchased feed cost was 12.64p/litre for herds over 400 cows, with up to 100-cow herds averaging about a penny less, at 11.72 p/litre.

ANNUAL RESULTS - YEAR END MARCH 2023								
Holstein/Friesian, Conventional Herds		Up to 100 cows	100 to 150 cows	150 to 200 cows	200 to 250 cows	250 to 300 cows	300 to 400 cows	Over 400 cows
Cows in herd		75	124	174	221	276	345	578
Stocking rate	cows/ha	1.91	2.09	2.47	2.19	2.68	2.54	2.81
MILK PRODUCTION								
Yield per cow	litres	7,523	7,897	8,344	8,698	9,149	9,435	9,693
Yield from all forage per cow	litres	2,859	2,799	2,888	2,733	2,832	2,664	2,471
Milk Price	pence	44.87	45.80	46.37	46.18	46.89	47.12	47.16
FEED								
Concentrate use per cow	kg	2,305	2,453	2,609	2,825	2,985	3,093	3,218
Concentrate use per litre	kg	0.31	0.31	0.31	0.32	0.33	0.33	0.33
Concentrate price per tonne	£	371	367	359	358	346	344	334
Other purchased feed cost per cow	£	27	58	76	86	107	136	151
Total purchased feed cost per cow	£	882	958	1014	1099	1138	1200	1225
Total purchased feed cost per litre	pence	11.72	12.12	12.15	12.63	12.44	12.72	12.64
All P.Feed @ 86% DM equiv. per cow	kg	2,416	2,625	2,818	3,053	3,235	3,474	3,694
MARGINS								
MOPF per cow	£	2,494	2,659	2,856	2,918	3,151	3,246	3,346
MOPF per litre	pence	33.15	33.67	34.23	33.55	34.45	34.40	34.52



As a result of the higher yields and prices, the margin over purchased feed increases with herd size, averaging £3,346/cow for herds over 400 cows and £2,494/cow for those up to 100 cows.

However, larger herds do not always see economies of scale and can struggle with labour challenges and other issues associated with a larger herd.

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HEALTH TRENDS

Mirroring the trend seen in recent years, herd health has continued to improve. Most health issues monitored showed a decline, and have done for several years, highlighting the continued efforts of dairy producers across the country to invest in facilities and training to improve health & welfare.

However, higher milk prices mean the cost of cases increased by £1,127 (4%) to an average cost of £30,195 per 200-cow herd (based on a milk price of 46p/litre, concentrate costs of £360/t and a yield of 8,500 litres). This makes it increasingly important to drill down on further improvements.

Mastitis is one area that is slightly surprising – incidents would most likely have increased over the summer due to the hot weather – but overall, the trend continues downwards. Averaging 41 cases per 100 cows in 2017, mastitis incidence has consistently declined year-on-year, to just 29 cases last year. This may be attributed to improved parlour hygiene and housing conditions.

Cases per 100 cows	Group	Top 25%	Est. Cost per Case	Group Cost	Top 25% Cost	Difference
Mastitis	29	15	£365	£10,439	£5,475	£4,964
Lameness	33	19	£332	£11,057	£6,308	£4,749
Milk Fever	2.8	0.9	£253	£708	£228	£481
Displaced Abomasums	2.3	1.2	£342	£787	£410	£376
Difficult Calvings	3.1	1.7	£399	£1,237	£678	£559
Retained Cleansings	3.9	2.4	£550	£2,145	£1,320	£825
Abortions	3.3	1.7	£625	£2,063	£1,063	£1,000
Metritis	5.4	4.6	£326	£1,760	£1,500	£261
TOTAL				£30,195	£16,982	£13,214

Cases per 100 cows	2019	2020	2021	2022	2023
Mastitis	39	36	32	30	29
Lameness	40	42	36	35	33

Likewise, lameness has continued its downward trajectory, from 43 cases per 100 cows in 2017 to 33 now. The blip in 2019/2020 can be explained by the wet autumn and winter that year, but the overall improvement is again due to improved housing conditions, regular mobility scoring, foot bathing and routine foot trimming.

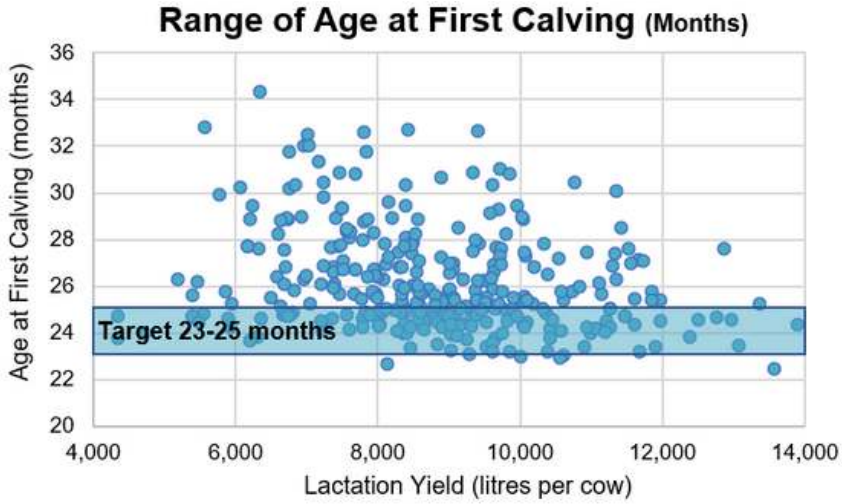
It is interesting to note the difference between the average and top quartile of herds – the latter have managed to reduce health issues significantly, saving them £13,214 a year. These figures also do not include the impact of poor health on fertility – which adds a significant extra cost. So anything producers can do to improve herd health will have a positive impact on the bottom line.

HEIFER TRENDS

Focusing on age at first calving of heifers and their longevity once in the herd is a key way to improve overall herd efficiency, helping to lower their cost to rear, as well as reducing the farm's carbon footprint.

There is a wide range in the average age at first calving. Many producers are not hitting the target of between 23 to 25 months of age, with 62% of herds calving in over 25 months (18% of herds were over 28 months). Kingshay's June checklist article on Youngstock rearing costs (available to *Insight* members) reported the cost to rear for different calving ages compared to the previous figure reported in December 2021. Back then, we calculated rearing costs to be £1,546 per head, if calving in at 2 years. Using current prices, these estimated costs have risen by 14% to £1,761 per head.

As stated on page 20, 50.2% of cows leaving the herd are in their first 3 lactations, before they have fully paid for the cost to rear them. When analysing first lactation heifers leaving during their first year in milk production, 28.4% (the highest reason) were due to fertility reasons, 14.9% were sold as a freshly calved heifers due to surplus stock (higher than previous years partly due to the use of sexed semen), followed by injury at 12% of leavers.



Source: digiFARM milk recording analysis

FERTILITY TRENDS

Fertility struggled a bit last year, with the hot summer affecting cows' display of oestrus cycles. As a result, days to first service increased from 69 to 75 days, with the calving interval gaining a day, to 394 days.

That said, the number of services per conception dropped again, by 0.1, to 2.2, and the conception rate increased from 38% to 42%. The 100-day in-calf rate again improved, year-on-year, to 46%, so it's surprising to see that the 200-day not in-calf rate jumped sharply, from 13% to 20%. It's unclear why this is, as the health trends (see page 18) show that abortions actually fell by 0.1 cases per 100 cows, to 3.3 cases. Possibly it is to do with producers not undertaking or recording all pregnancy diagnosis.

Given the higher milk prices last year, the cost of infertility has unsurprisingly increased. Based on a rolling 12-month average milk price of 46p/litre and concentrate costs of £360/t, infertility cost a 200-cow herd averaging 8,500 litres approx. £185/head or 2.17p/litre.

After two years of static infertility culling rates of 6.7%, last year this increased to 7.2%. Fertility reasons accounted for 24.9% of herd culls (see page 20), with those not in-calf accounting for 15.1%, repeat breeders 6.3% and abortions 3.2%.

With last year's high milk prices, the cost of an extended calving interval increased, up by 13% to £5.89/day. Extrapolated across a 200-cow herd, that equates to £1,178/day – a significant amount, and certainly an area on which to focus with the help of your vet, nutritionist, and perhaps fertility monitors.

Fertility Status (Year ending...)	This Year (March 2023)	Last Year (March 2022)
Calving interval	394	393
Days to first service	75	69
Services per conception	2.2	2.3
Conception rate	42%	38%
100 day In calf rate	46%	44%
200 day not in calf rate	20%	13%
Infertility culling rate	7.2%	6.7%
Cost of Infertility (ppl)	**2.17**	**1.87**
Cost of Infertility (£/Cow)	**£185**	**£159**
Cost of extended calving interval per day	**£5.89**	**£5.23**

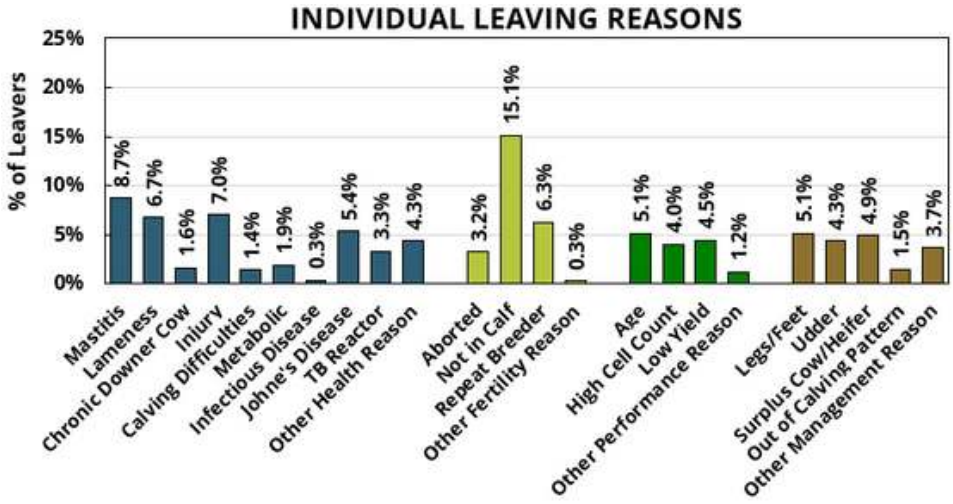
REASONS FOR COWS LEAVING THE HERD

Cow health and welfare appears to have improved on dairy farms as the proportion of forced (or involuntary) culls has dropped to its lowest level for a decade.

Normally, forced culling (due to health reasons such as mastitis or lameness) accounts for about 70% of the total herd leavers each year. However, this declined to 65% in the year to the end of March 2023. Instead, more animals left the herd due to selective (voluntary) culling for reasons such as poor production performance, high cell counts and age.

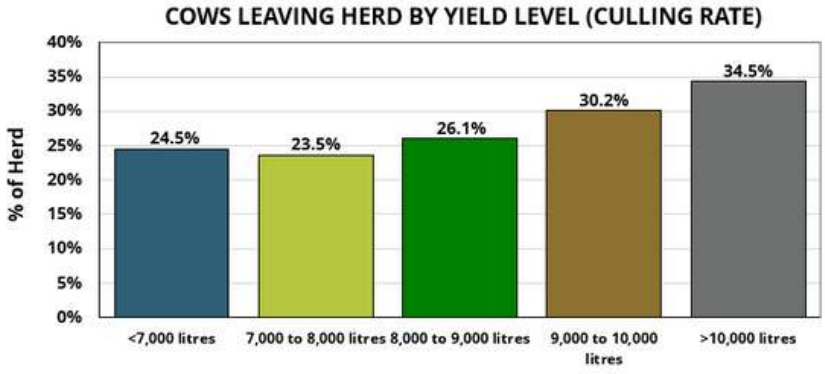
Overall, the rate of cows leaving was 29.1%, up slightly from the previous year's leaving rate of 28.5%. Of these, 50.2% were in their first three lactations, which was slightly down on the previous level of 51%. This indicates improved health and the need to retain cows to capitalise on a higher milk price.

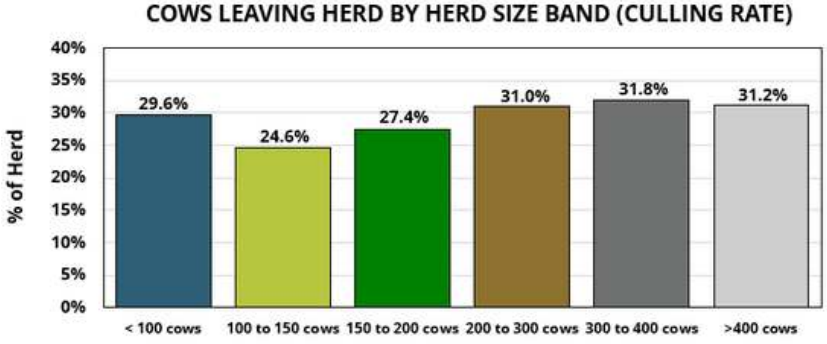
Proportion of Cows Leaving the Herd
(Forced Vs Selected)



Also indicating better health, was the proportion of casualty cows, which dropped back from 18.1% to 16.8% in the 12 months to March 2023. Among the main reasons for cows leaving the herd, not-in-calf was the highest by some margin at 15.1%. The next highest was mastitis at 8.7%, followed by injury at 7%, then lameness which was recorded at 6.7% of departures.

Diseases like Johne's and TB resulted in the departures of 5.4% and 3.3% of cows, respectively, while other diseases were recorded for 4.3% of leavers.



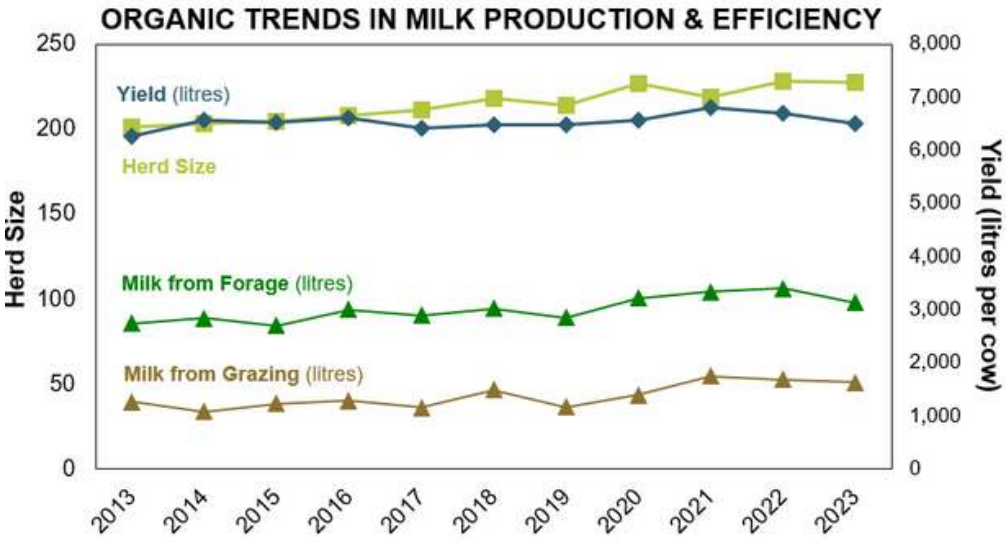


ORGANIC UPDATE

It has been a year of very little change for organic herds, outside of the obvious increases in milk price and feed costs. Although the sample isn't necessarily the same as last year, the average figures are fairly similar, except for a small decrease in herd size to 232 head.

Yields also showed a marginal decline, to 6,561 litres per cow, with butterfat and protein climbing slightly, to 4.23% and 3.34%, respectively. Yields from forage were also pretty stable, although, unlike conventional producers, organic producers managed to increase yields from forage slightly, to 3,220 litres/cow.

Organic herds also managed to buck the trend when it comes concentrate use per cow – dropping 18kg/cow to average 1,694kg. Given the 29% increase in concentrate prices (the same percentage increase as conventional concentrates), that's no bad thing; although – like their conventional counterparts – producers did spend more on other purchased feeds.



Overall, purchased feed costs increased by 27%, year-on-year, to £943/cow. However, unlike conventional producers, the milk price: feed price ratio didn't change on the year, remaining static at 0.92. That reflects the fact that organic milk prices did not increase by the same margin as conventional values, while concentrate prices did.

On average, organic milk prices increased by 28% (11.03p), to 50.3p/litre, while conventional prices jumped by 43% (13.97p), to 46.18p/litre over the same period.

As a result, organic producers' margin over purchased feed increased by 28% compared to their conventional counterparts' jump of 49%. This left them earning a margin over purchased feed of £2,357/cow, or 35.92p/litre.

For regular analysis on organic trends and comparisons to other herds, contact Kingshay to discuss the options available.

ANNUAL ROLLING RESULTS					
Organic Herds, All Breeds (comparing matched herds)		**Year Ending March 2022**	**Year Ending March 2023**	**Difference**	**% Change**
Cows in herd		242	232	-10	-4.1%
Stocking rate	cows/ha	1.90	1.83	-0.07	-3.7%
MILK PRODUCTION					
Yield per cow	litres	6,575	6,561	-14	-0.2%
Yield from all forage per cow	litres	3,197	3,220	23	0.7%
Butterfat	%	4.19	4.23	0.04	1.0%
Protein	%	3.32	3.34	0.02	0.6%
Cellcount		182	181	-1	-0.5%
Milk Price	pence	39.27	50.30	11.03	28.1%
FEED					
Concentrate use per cow	kg	1,712	1,694	-18	-1.1%
Concentrate use per litre	kg	0.26	0.26	0.00	0.0%
Concentrate price per tonne	£	427	549	122	28.6%
Other purchased feed cost per cow	£	11	13	2	18.2%
Total purchased feed cost per cow	£	742	943	201	27.1%
Total purchased feed cost per litre	pence	11.29	14.37	3.08	27.3%
All P.Feed @ 86% DM equiv. per cow	kg	1,749	1,745	-4	-0.2%
MARGINS					
MOPF per cow	£	1,840	2,357	517	28.1%
MOPF per litre	pence	27.98	35.92	7.94	28.4%

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CHANNEL ISLAND UPDATE

Milk solids and overall yields dropped back in the year to the end of March 2023, possibly due to a switch to alternative rations to counter high feed prices.

Yields fell by slightly over 1%, to 5,695 litres/cow, and milk solids dropped from 537kg/cow to 524kg between March 2022 and March 2023. Butterfat was down from 5.44% to 5.36% and milk protein reduced from 3.88% to 3.84%.

ANNUAL ROLLING RESULTS					
Channel Island, Conventional Herds (comparing matched herds)		Year Ending March 2022	Year Ending March 2023	Difference	% Change
Cows in herd		201	206	5	2.5%
Stocking rate	cows/ha	2.56	2.61	0.05	2.0%
MILK PRODUCTION					
Yield per cow	litres	5,761	5,695	-66	-1.1%
Yield from all forage per cow	litres	2,098	2,145	47	2.2%
Butterfat	%	5.44	5.36	-0.08	-1.5%
Protein	%	3.88	3.84	-0.04	-1.0%
Milk solids	kg/cow	537	524	-13.0	-2.4%
Milk Price	pence	39.85	55.04	15.19	38.1%
FEED					
Concentrate use per cow	kg	1,970	1,916	-54	-2.7%
Concentrate use per litre	kg	0.34	0.34	0.00	0.0%
Concentrate price per tonne	£	289	369	80	27.7%
Other purchased feed cost per cow	£	83	96	13	15.7%
Total purchased feed cost per cow	£	652	803	151	23.2%
Total purchased feed cost per litre	pence	11.32	14.10	2.78	24.6%
All P.Feed @ 86% DM equiv. per cow	kg	2,228	2,161	-67	-3.0%
MARGINS					
MOPF per cow	£	1,644	2,332	688	41.8%
MOPF per litre	pence	28.54	40.95	12.41	43.5%

Unlike many conventional herds, Channel Island producers cut concentrate use, by 54kg/cow, to 1,916kg in the 12-month period. This was in a bid to cut costs, given the increase in feed prices from an average of £289/t in the year to March 2022 to £369/t a year later.

Despite the reduced usage, the total purchased feed cost per cow was up from £652 to £803 for the year - an increase of 23%. Broken down to a per-litre basis, feed costs jumped by almost a quarter (24.2%), to 14.10p/litre.

Yield from all forage consequentially rose from 2,098 litres/cow to 2,145 litres over the 12 months.

Forage production challenges and high feed costs were compensated for by a 38.1% hike in milk prices, which averaged 55.04p/litre in March 2023.

The margin over purchased feed (MOPF) per litre showed an even greater rise, of 43.5% to 40.95p/litre. MOPF per cow was slightly lower, at 41.8%, up from £1,644 to £2,332 in the 12 months to March 2023.

CROSSBRED HERDS UPDATE

Milk from forage showed a marked drop in crossbreed herds as the hot, dry summer of 2022 took its toll on grass growth and conserved forage stocks.

Yields from forage averaged 2,976 litres/cow in the year to the end of March 2023 - down 245 litres or 7.6% on the previous 12 months.

Crossbreed herds are more likely to rely on extensive grazing and forage-fed systems, and the dry weather in 2022/23 saw some producers forced to buy in feed to compensate. As a result, concentrate use per cow was up by 137kg (8.3%), to 1,780kg in the year to March 2023. With prices high, total purchased feed costs soared by 52.7%, to £695/cow, or 10.55p/litre, up 47.6%. Despite the costs, a combination of higher yields from the improved ration and peak milk prices more than offset the extra outlay.

Yields rose to 6,588 litres/cow at the end of March 2023, from 6,364 litres/cow at the same stage a year earlier. At the same time, milk prices rose from 34.9p/litre to 49.25p/litre - a 44.5% increase.

ANNUAL ROLLING RESULTS					
Crossbreeds, Conventional Herds (comparing matched herds)		Year Ending March 2022	Year Ending March 2023	Difference	% Change
Cows in herd		251	273	22	8.8%
Stocking rate	cows/ha	2.72	2.69	-0.03	-1.1%
MILK PRODUCTION					
Yield per cow	litres	6,364	6,588	224	3.5%
Yield from all forage per cow	litres	3,221	2,976	-245	-7.6%
Butterfat	%	4.49	4.51	0.02	0.4%
Protein	%	3.54	3.55	0.01	0.3%
Milk Price	pence	34.09	49.25	15.16	44.5%
FEED					
Concentrate use per cow	kg	1,643	1,780	137	8.3%
Concentrate use per litre	kg	0.26	0.27	0.01	3.8%
Concentrate price per tonne	£	266	359	93	35.0%
Other purchased feed cost per cow	£	18	56	38	211%
Total purchased feed cost per cow	£	455	695	240	52.7%
Total purchased feed cost per litre	pence	7.15	10.55	3.40	47.6%
All P.Feed @ 86% DM equiv. per cow	kg	1,717	1,978	261	15.2%
MARGINS					
MOPF per cow	£	1,714	2,550	836	48.8%
MOPF per litre	pence	26.93	38.71	11.78	43.7%

Margin over purchased feed (MOPF) per litre showed a corresponding rise of 43.7%, to 38.71p/litre, while the rise in MOPF per cow was still higher, up 48.8% to £2,550 in the 12 months to March 2023.

MEET THE DAIRY MANAGER TEAM

Track your dairy herd's performance on a monthly basis with special reports to benchmark your herd against others on similar systems with our Starter Package (both conventional and organic). For detailed reports monitoring your dairy herd's health status and bottom line profit sign up to our Premium or Premium Plus service.

If there are any points you would like to discuss from this report, or further in-depth analysis required, then give us a call to discuss on 01458 851555 or email us at dairy.manager@kingshay.co.uk.

KATHRYN ROWLAND

Senior Farm Services Manager

Kathryn joined Kingshay 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 will be known to many of you as the main contact for any customer service queries regarding your herd(s). She is responsible for the smooth running of our Dairy Manager service. Having joined the team in 2013, she now regularly analyses production results and industry trends for clients.

MARY-KATE FOSTER

Farm Services Specialist

Mary-Kate is responsible for the smooth running of the antimicrobial service for key corporate clients. She joined the team in 2021 and deals with any Dairy Manager queries.

CHRISTINA FORD

Product Owner

Christina manages the antimicrobial reporting service alongside other corporate projects, having 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 Dairy Manager service from the beginning, having joined Kingshay in 1994. He now oversees all of our development projects, alongside leading the Kingshay team.

HANNAH BURNS

Services Support & Marketing Coordinator

Hannah creates all things marketing including, social media posts, adverts, fliers, newsletters and more. She also looks after FarmIQ queries and orders.

Kingshay

Providing Evidence-Based Livestock Solutions

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

The UK's leading dairy costings service includes 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 and antimicrobial use.

Consultancy & Training

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

Data Services

A growing part of Kingshay is developing bespoke tools and services to organisations across the agricultural industry. Our unique combination of farming expertise & technical IT skills enable us to provide an Online Portal, Phone Apps, Data Integration and Big Data Management.

FarmIQ

An online training provider for farmers. Providing courses created by vets and industry leaders for further training and assurance certification. Kingshay members get exclusive discount and offers for specific courses.

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

Search 'Kingshay Farming'

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