

# **Report on Statutory Survey**

## **Milk Producers' Organisation**



**February 2015**

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## 1. Introduction

The Milk Producers' Organisation is empowered by government regulation to collect information on milk producers and milk production. This survey was executed during October and November 2014. It consisted of an initial E-mail round followed by two E-mail rounds and a telephone survey with non-responders and producers without E-mail contact. Incomplete questionnaires were followed up by telephone during December 2014. In total 601 usable responses were obtained (32,9%). The total response is compared with the registered number of producers per province in Table 1.

**Table 1: Survey response and registered producers per province, November 2014**

<b>Province/</b>	<b>Responders</b>	<b>%</b>	<b>Producers</b>	<b>%</b>	<b>Response % of producers</b>
Northwest	53	8.8%	210	11.5%	25.2%
Freestate	90	15.0%	316	17.3%	28.5%
Mpumalanga	24	4.0%	101	5.5%	23.8%
Northern Cape	9	1.5%	20	1.1%	45.0%
Limpopo	3	0.5%	13	0.7%	23.1%
Western Cape	203	33.8%	533	29.2%	38.1%
Gauteng	16	2.7%	102	5.6%	15.7%
Kwazulu Natal	106	17.6%	274	15.0%	38.7%
Eastern Cape	97	16.1%	256	14.0%	37.9%
Total	601	100.0%	1 825	100.0%	32.9%

The response varied between 23,1% and 45,0%. The survey provides a fair indication of the profile of the primary dairy industry in South Africa. Provincial figures should be treated with caution.

## 2. Herd composition and structure

The average composition of dairy herds per province is shown in Table 2 and the percentage composition in Table 3. Eastern Cape herds are the largest and Northwest herds are the smallest.

**Table 2: Herd composition (numbers), average dairy herd per province**

Province	Cows in milk	Dry cows	Heifers >1 year	Heifers < 1 year	% of cows dry
Northwest	90	28	36	28	23.4%
Freestate	140	40	56	56	22.2%
Mpumalanga	169	34	62	72	16.6%
Northern Cape	76	27	35	33	26.2%
Limpopo	230	31	111	106	12.0%
Western Cape	281	107	101	105	27.6%
Gauteng	117	25	48	45	17.5%
Kwazulu Natal	574	58	235	221	9.1%
Eastern Cape	769	104	281	365	11.9%
<b>Total</b>	<b>353</b>	<b>74</b>	<b>138</b>	<b>147</b>	<b>17.3%</b>

**Table 3: Herd composition (%), average dairy herd per province**

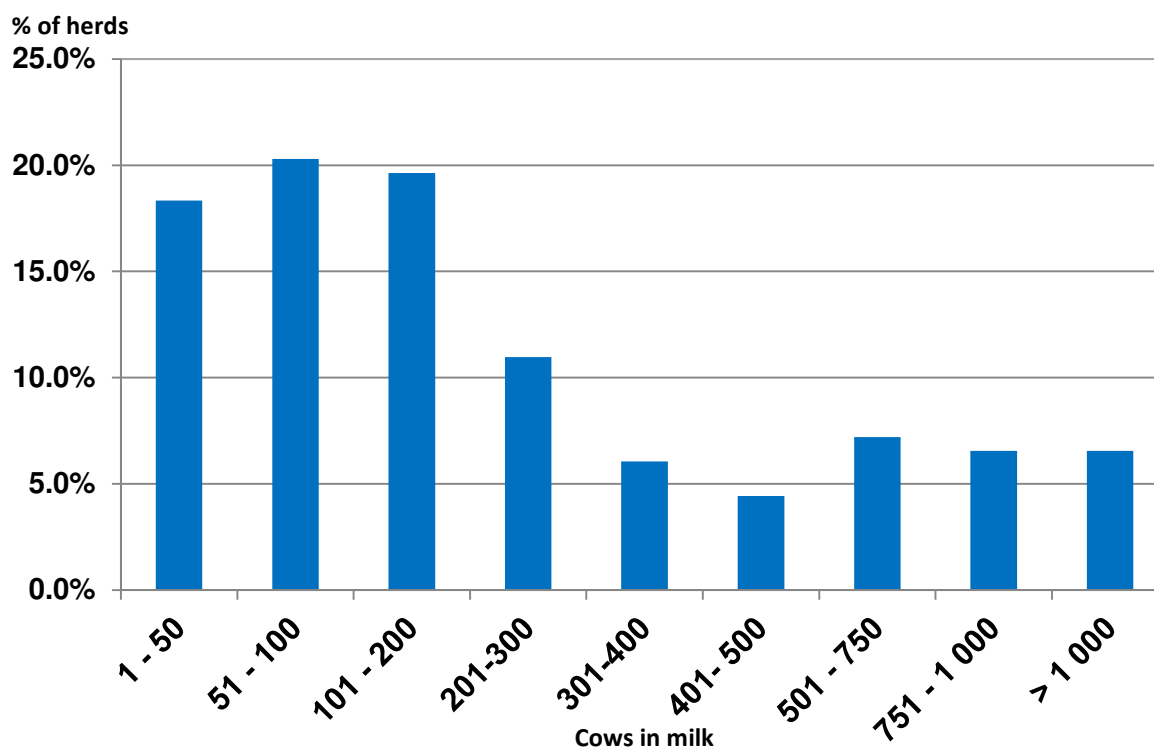
Province	Cows in milk	Dry cows	Heifers >1 year	Heifers < 1 year
Northwest	49.7%	15.1%	19.7%	15.5%
Freestate	47.9%	13.7%	19.4%	19.0%
Mpumalanga	50.2%	10.0%	18.4%	21.4%
Northern Cape	44.6%	15.8%	20.3%	19.3%
Limpopo	48.1%	6.6%	23.2%	22.2%
Western Cape	47.3%	18.1%	17.0%	17.7%
Gauteng	49.8%	10.6%	20.5%	19.2%
Kwazulu Natal	52.8%	5.3%	21.6%	20.3%
Eastern Cape	50.6%	6.9%	18.5%	24.0%
<b>Total</b>	<b>49.6%</b>	<b>10.4%</b>	<b>19.4%</b>	<b>20.7%</b>

The distribution of milk producers per herd size interval is shown in Table 4 and Figure 1. Fifty-nine per cent of dairy herds are still smaller than 200 cows while 20% of herds are larger than 500 cows.

**Table 4: Distribution of milk producers per herd size group (cows in herd)**

Cows in milk	% Of producers	Cumulative % of producers	
		Less than	More than
1 - 50	18.3%	18.3%	100.0%
51 - 100	20.3%	38.6%	81.7%
101 - 200	19.6%	58.3%	61.4%
201-300	11.0%	69.2%	41.7%
301-400	6.1%	75.3%	30.8%
401- 500	4.4%	79.7%	24.7%
501 - 750	7.2%	86.9%	20.3%
751 - 1 000	6.5%	93.5%	13.1%
> 1 000	6.5%	100.0%	6.5%
Total	100.0%		

**Figure 1: Distribution of milk producers per herd size group**

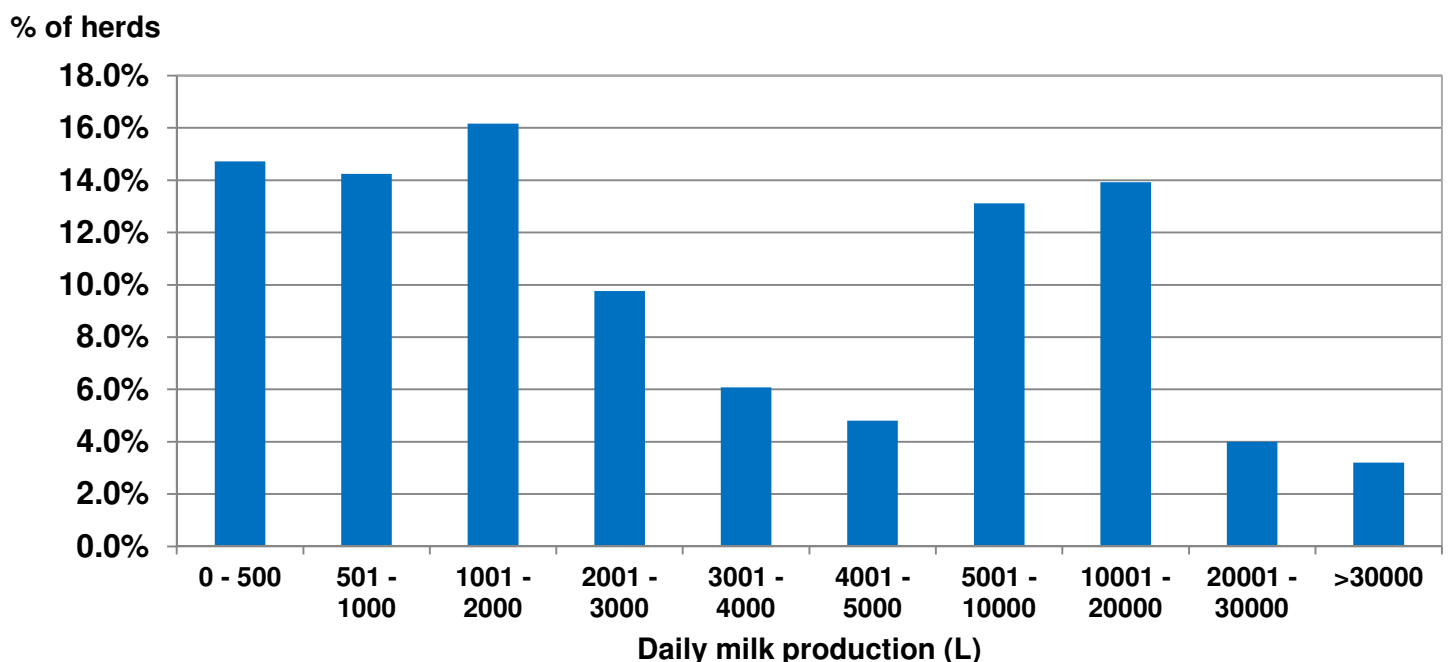


The distribution of herds based on total daily production is shown in Table 5 and Figure 2. Fifty-five per cent of producers produce 3 000 litres and less per day and 39% produce more than 4 000 litres per day.

**Table 5: Distribution of milk producers per production group**

Daily production (L)	Cumulative % of producers		
	% Of producers	Less than	More than
0 - 500	14.7%	14.7%	100.0%
501 - 1000	14.2%	29.0%	85.3%
1001 - 2000	16.2%	45.1%	71.0%
2001 - 3000	9.8%	54.9%	54.9%
3001 - 4000	6.1%	61.0%	45.1%
4001 - 5000	4.8%	65.8%	39.0%
5001 - 10000	13.1%	78.9%	34.2%
10001 - 20000	13.9%	92.8%	21.1%
20001 - 30000	4.0%	96.8%	7.2%
>30000	3.2%	100.0%	3.2%
Total	100.0%		

**Figure 2: Distribution of milk producers per production group**

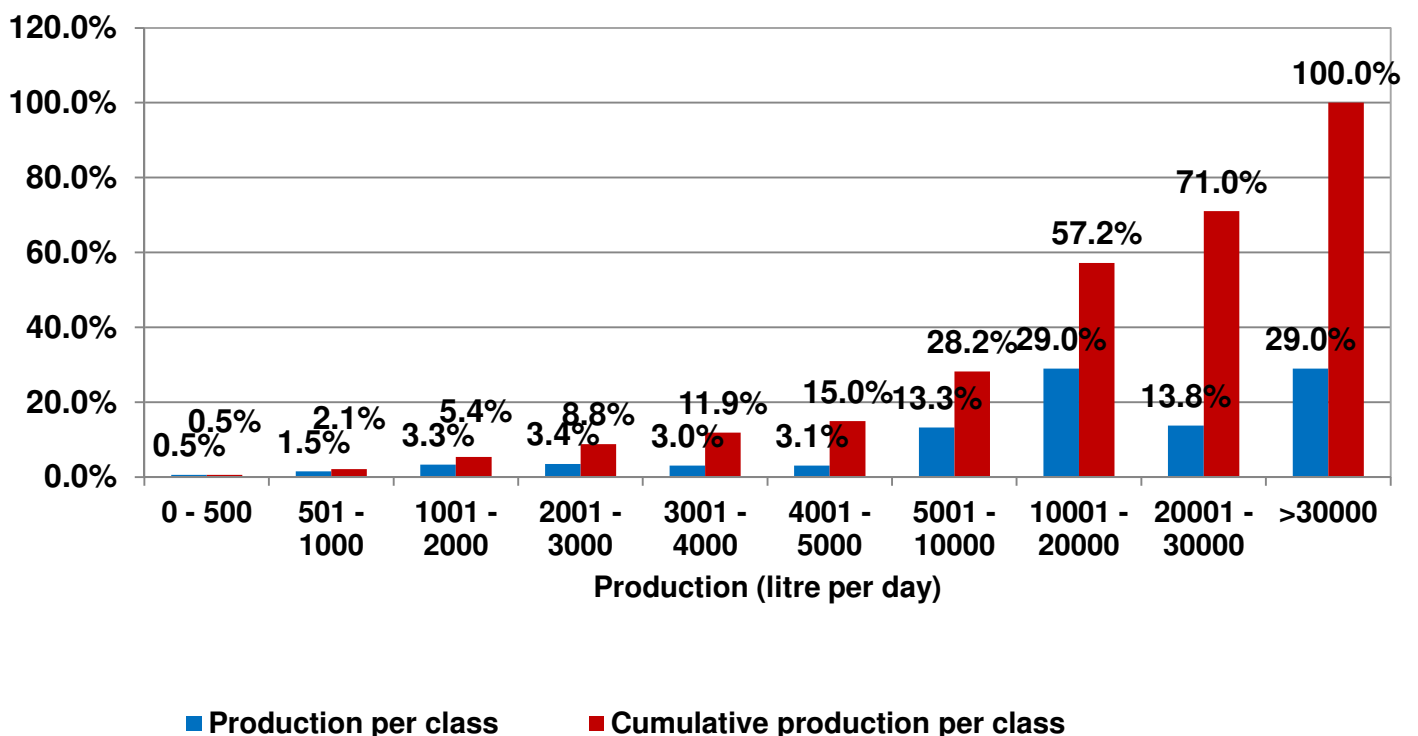


The share of total milk production per production class is shown in Table 6 and Figure 3. Large producers (above 5 000 ,litres/day) produce 85% of total milk production.

**Table 6: Milk production per production class**

Daily production (L)	% Of production	Cumulative % of production	
		Less than	More than
0 - 500	0.5%	0.5%	100.0%
501 – 1 000	1.5%	2.1%	99.5%
1 001 – 2 000	3.3%	5.4%	97.9%
2 001 – 3 000	3.4%	8.8%	94.6%
3 001 – 4 000	3.0%	11.9%	91.2%
4 001 – 5 000	3.1%	15.0%	88.1%
5 001 – 10 000	13.3%	28.2%	85.0%
10 001 – 20 000	29.0%	57.2%	71.8%
20 001 – 30 000	13.8%	71.0%	42.8%
>30 000	29.0%	100.0%	29.0%
Total	100.0%		

**Figure 3: Milk production per production class**



### 3. Milk production

Daily average production and utilisation of average milk production per province is shown in Table 7. The Eastern Cape has the highest production per day followed by Kwa Zulu Natal.

**Table 7: Daily milk production and utilisation per producer per province**

<b>Province</b>	<b>Daily production (L)</b>	<b>Delivered to market (L)</b>	<b>On-farm use (L)</b>	<b>% Delivered</b>
Northwest	707	700	7	99.01%
Freestate	2 543	2 106	437	82.83%
Mpumalanga	3 845	3 811	34	99.11%
Northern Cape	1 475	1 112	363	75.36%
Limpopo	7 766	7 615	151	98.06%
Western Cape	5 455	4 680	775	85.80%
Gauteng	2 279	2 153	126	94.47%
Kwazulu Natal	11 519	11 124	395	96.57%
Eastern Cape	16 436	16 064	372	97.74%
National average	7 282	6 961	321	95.60%

Daily milk production per cow in milk per day is shown in Table 8.



**Table 8: Milk production per cow in herd per province**

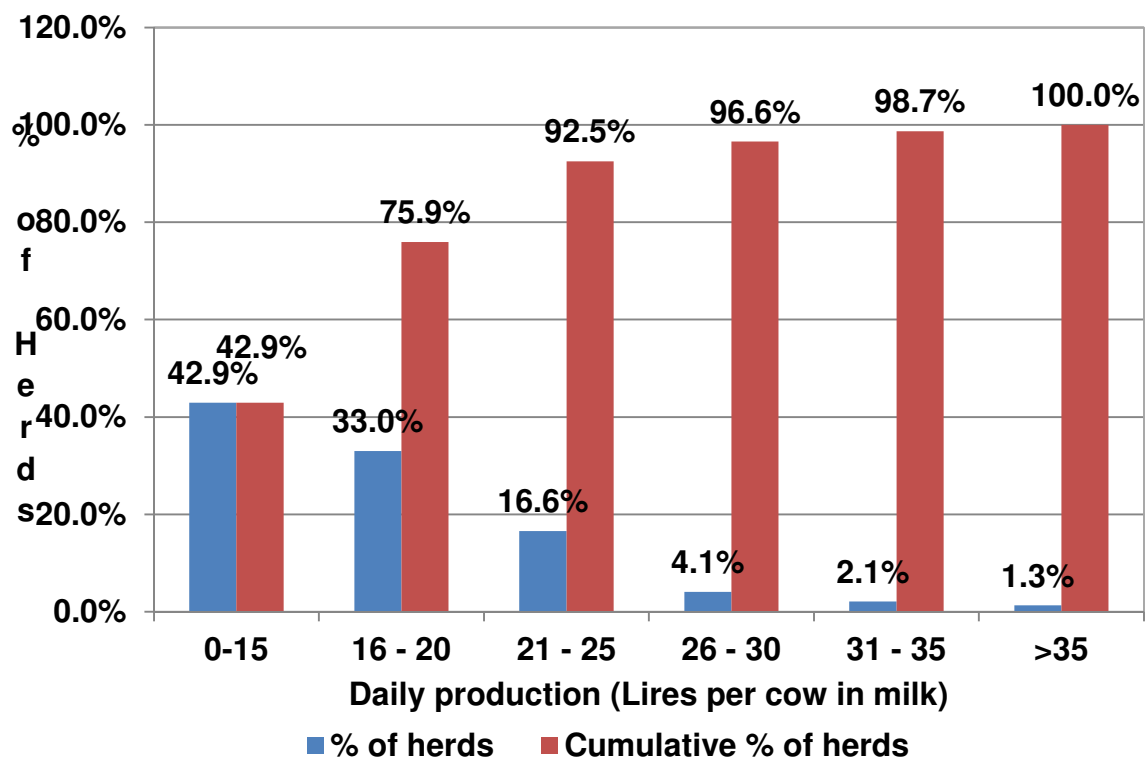
<b>Province</b>	<b>Average milk production per cow per day (L/day)</b>
Northwest	17,7
Freestate	17,8
Mpumalanga	22,0
Northern Cape	18,8
Limpopo	32,7
Western Cape	18,9
Gauteng	18,9
Kwazulu Natal	19,9
Eastern Cape	22.5
Total	20,4

The distribution of herds based on average milk production per cow per day is shown in Table 9 and Figure 4. Ninety-two per cent of herds have an average daily production per cow in milk of less than 25 litres.

**Table 9: Herd distribution based on average production per cow in milk per day**

Production/day (L)	% of herds	Cumulative % of herds
0-15	42.9%	42.9%
16 - 20	33.0%	75.9%
21 - 25	16.6%	92.5%
26 - 30	4.1%	96.6%
31 - 35	2.1%	98.7%
>35	1.3%	100.0%

**Figure 4: Herd distribution based on average production per cow in milk per day**



#### 4. Geographical distribution of milk production

Geographical distribution of total milk production based on received questionnaires and adjusted for non-response is shown in Table 10 and Figure 5. More than 83% of total milk is produced in the three coastal provinces (2009 = 74%).

**Table 10: Geographical distribution of milk production per province**

Province	2011	2012	2013	2014
Western Cape	26.6%	27,4%	26,4%	26.8%
Freestate	13.5%	10,5%	9,5%	7.3%
Eastern Cape	24.5%	24,3%	26,8%	27.7%
Northwest	4.8%	3.5%	4,5%	4.2%
Northern Cape	0.3%	1.0%	0,9%	0.8%
Mpumalanga	3.8%	3.6%	3,3%	3.3%
Limpopo	0.6%	0,7%	0,9%	0,8%
Kwazulu Natal	23.6%	23,5%	24,5%	26.8%
Gauteng	2.6%	5.5%	3,2%	2.3%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100,0%</b>	<b>100,0%</b>

**Figure 5: Milk production per province**

