

Report on Statutory Survey

Milk Producers' Organisation



May 2016

Contents

	Contents	1
1	Introduction	2
2	Herd composition and structure	2
3	Milk production	7
4	Geographical distribution of milk production	8

1. Introduction

The Milk Producers' Organisation (MPO) is compelled by government regulation to collect specific information on milk producers and milk production. This survey was carried out during October and November 2015. It consisted of an initial email survey followed by two additional email surveys and a telephone survey with persons who failed to respond and producers without email contact. Incomplete questionnaires were followed up by telephone in December 2015 and January 2016. In total 853 usable responses were obtained (50,7%). 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 2015

Province	Responders	%	Producers	%	Response % of producers
North West	103	12,0	181	10,8	56,9%
Free State	141	16,6	280	16,6	50,4%
Mpumalanga	33	3,9	93	5,5	35,5%
Northern Cape	9	1,1	14	0,8	64,3%
Limpopo	7	0,8	12	0,7	58,3%
Western Cape	282	33,0	502	29,8	56,2%
Gauteng	41	4,8	97	5,8	42,3%
KwaZulu-Natal	101	11,9	253	15,0	39,9%
Eastern Cape	136	15,9	251	14,9	54,2%
Total	854	100,0	1 683	100,0	50,7%

The response rate of the different regions varied between 35,5% and 56,9%.

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. The largest herds are in KwaZulu-Natal and the Eastern Cape and the smallest in North West and the Free State.

Table 2: Herd composition (numbers), average dairy herd per province, 2015

Province	Cows in milk	Dry cows	Heifers >1 year	Heifers < 1 year
North West	125	31	50	116
Free State	117	42	45	38
Mpumalanga	158	33	76	48
Northern Cape	284	72	92	97
Limpopo	303	63	139	116
Western Cape	262	57	102	105
Gauteng	194	82	67	57
KwaZulu-Natal	604	73	239	218
Eastern Cape	589	89	206	211
Total	322	58	188	120

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

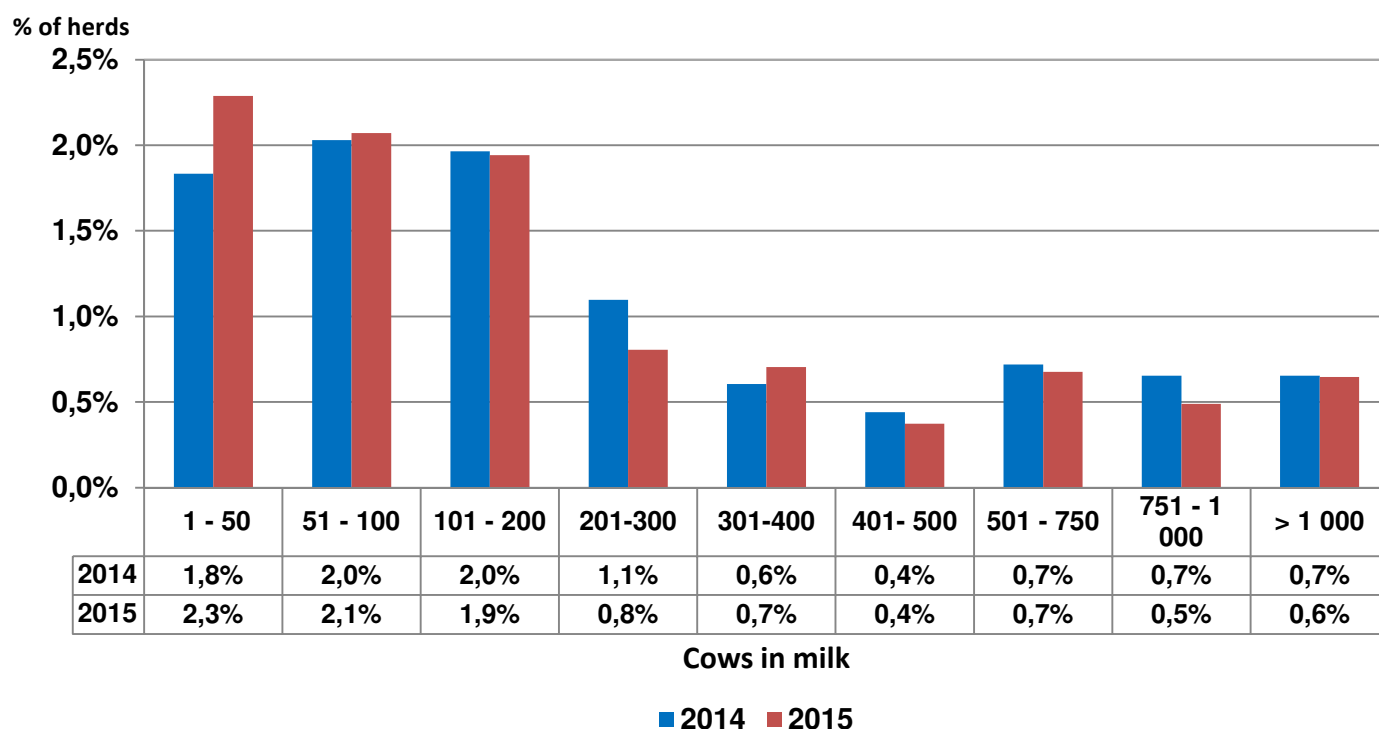
Province	Cows in milk	Dry cows	Heifers >1 year	Heifers < 1 year
North West	38,8%	9,6%	15,5%	36,0%
Free State	48,3%	17,4%	18,6%	15,7%
Mpumalanga	50,2%	10,5%	24,1%	15,2%
Northern Cape	52,1%	13,2%	16,9%	17,8%
Limpopo	48,8%	10,1%	22,4%	18,7%
Western Cape	49,8%	10,8%	19,4%	20,0%
Gauteng	48,5%	20,5%	16,8%	14,3%
KwaZulu-Natal	53,3%	6,4%	21,1%	19,2%
Eastern Cape	53,8%	8,1%	18,8%	19,3%
Total	46,8%	8,4%	27,3%	17,4%

The distribution of milk producers per herd size interval is shown in Table 4 and Figure 1. Sixty-three per cent of dairy herds still have less 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	
	2014	2015	2014	2015
1 - 50	18,3%	22,9%	18,3%	22,9%
51 - 100	20,3%	20,7%	38,6%	43,6%
101 - 200	19,6%	19,4%	58,3%	63,0%
201-300	11,0%	8,1%	69,2%	71,1%
301-400	6,1%	7,1%	75,3%	78,1%
401- 500	4,4%	3,7%	79,7%	81,9%
501 - 750	7,2%	6,8%	86,9%	88,6%
751 - 1 000	6,5%	4,9%	93,5%	93,5%
> 1 000	6,5%	6,5%	100,0%	100,0%
Total	100,0%	100,0%		

Figure 1: Distribution of milk producers per cow in milk

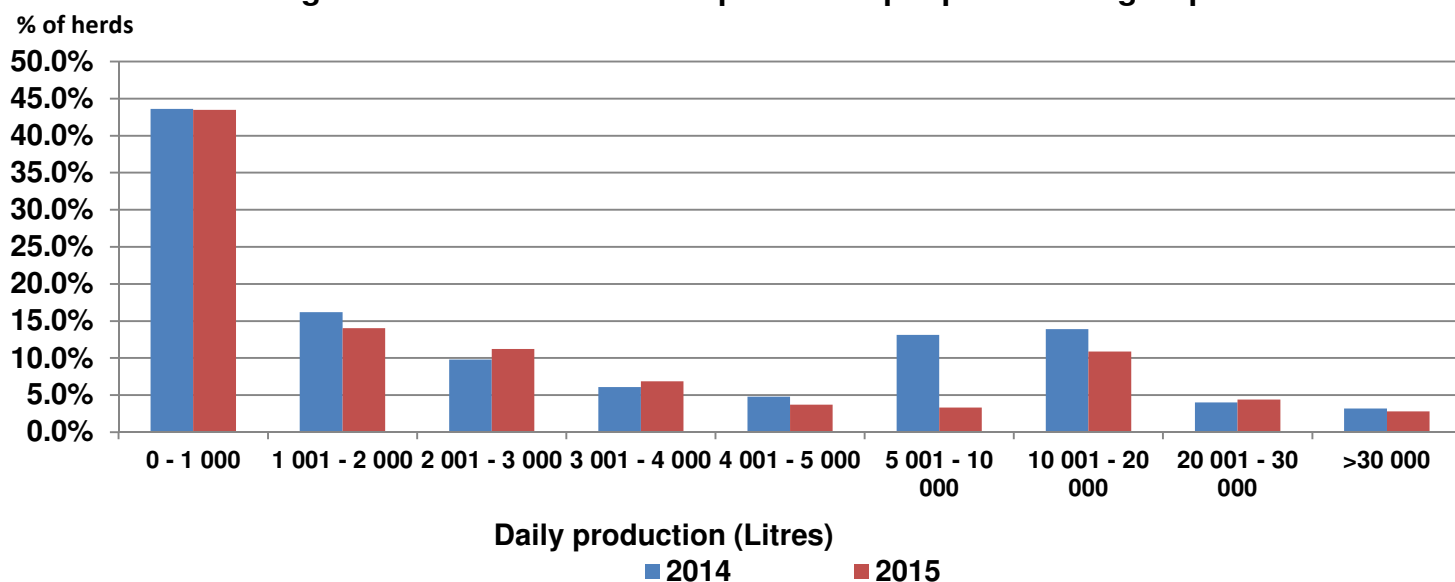


The distribution of herds based on total daily production is shown in Table 5 and Figure 2. Sixty-eight per cent of producers produce 3 000 £ and less per day and 21% produce more than 4 000 £ per day.

Table 5: Distribution of milk producers per production group

Daily production (£)	% of producers		Cumulative % of producers	
	2014	2015	2014	2015
0 - 500	14,7%	28,6%	14,7%	28,6%
0 – 1 000	28,9%	14,2%	29,0%	42,8%
1 001 – 2 000	16,2%	14,0%	45,1%	56,8%
2 001 – 3 000	9,8%	11,2%	54,9%	68,1%
3 001 – 4 000	6,1%	6,8%	61,0%	74,9%
4 001 – 5 000	4,8%	3,7%	65,8%	78,6%
5 001 – 10 000	13,1%	3,3%	78,9%	81,9%
10 001 – 20 000	13,9%	10,9%	92,8%	92,8%
20 001 – 30 000	4,0%	4,4%	96,8%	97,2%
>30 000	3,2%	2,8%	100,0%	100,0%
Total	100,0%	100,0%		

Figure 2: Distribution of milk producers per production group

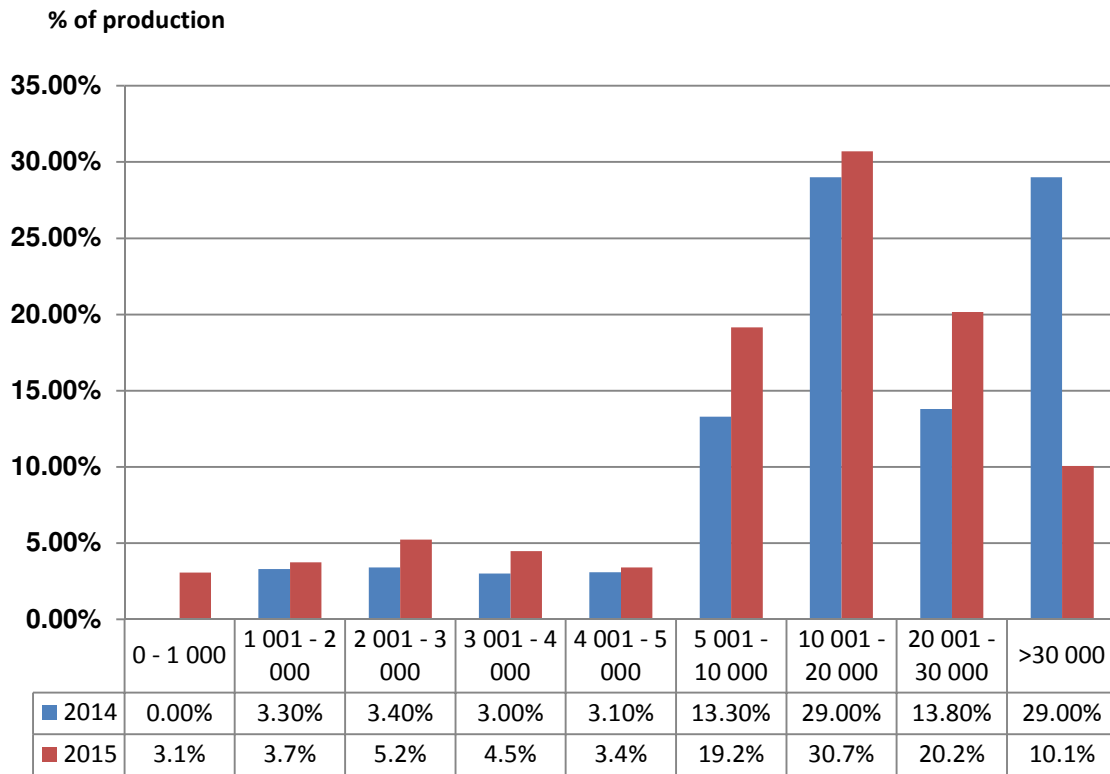


The share of total milk production per production class is shown in Table 6 and Figure 3. Large producers (above 5 000 ℓ./day) produce 80% of total milk production.

Table 6: Milk production per production class, 2014 & 2015

Daily production (ℓ)	% Of production		Cumulative % of production	
	2014	2015	2014	2015
1 – 1 000	2,0%	3,1%	2,1%	3,1%
1 001 – 2 000	3,3%	3,7%	5,4%	6,8%
2 001 – 3 000	3,4%	5,2%	8,8%	12,0%
3 001 – 4 000	3,0%	4,5%	11,8%	16,5%
4 001 – 5 000	3,1%	3,4%	14,9%	19,9%
5 001 – 10 000	13,3%	19,2%	28,2%	39,1%
10 001 – 20 000	29,0%	30,7%	57,2%	69,8%
20 001 – 30 000	13,8%	20,2%	71,0%	89,9%
>30 000	29,0%	10,1%	100,0%	100,0%
Total	100,0%	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. KwaZulu- Natal has the highest production per day, followed by the Eastern Cape.

Table 7: Daily milk production and utilisation per dairy farm per province

Province	Daily production (ℓ)	Delivered to market (ℓ)	On-farm use (ℓ)	% Delivered
North West	4 831	4 782	49	99,0%
Free State	2 280	2 254	26	98,9%
Mpumalanga	3 017	2 989	28	99,1%
Northern Cape	3 730	3 490	240	93,6%
Limpopo	9 073	8 972	101	98,9%
Western Cape	4 714	4 622	92	98,0%
Gauteng	3 037	2 999	38	98,7%
KwaZulu-Natal	11 870	11 696	174	98,5%
Eastern Cape	11 275	11 074	201	98,2%
National average	4 845	4 734	111	97,7%

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

Table 8: Milk production per cow in milk per province

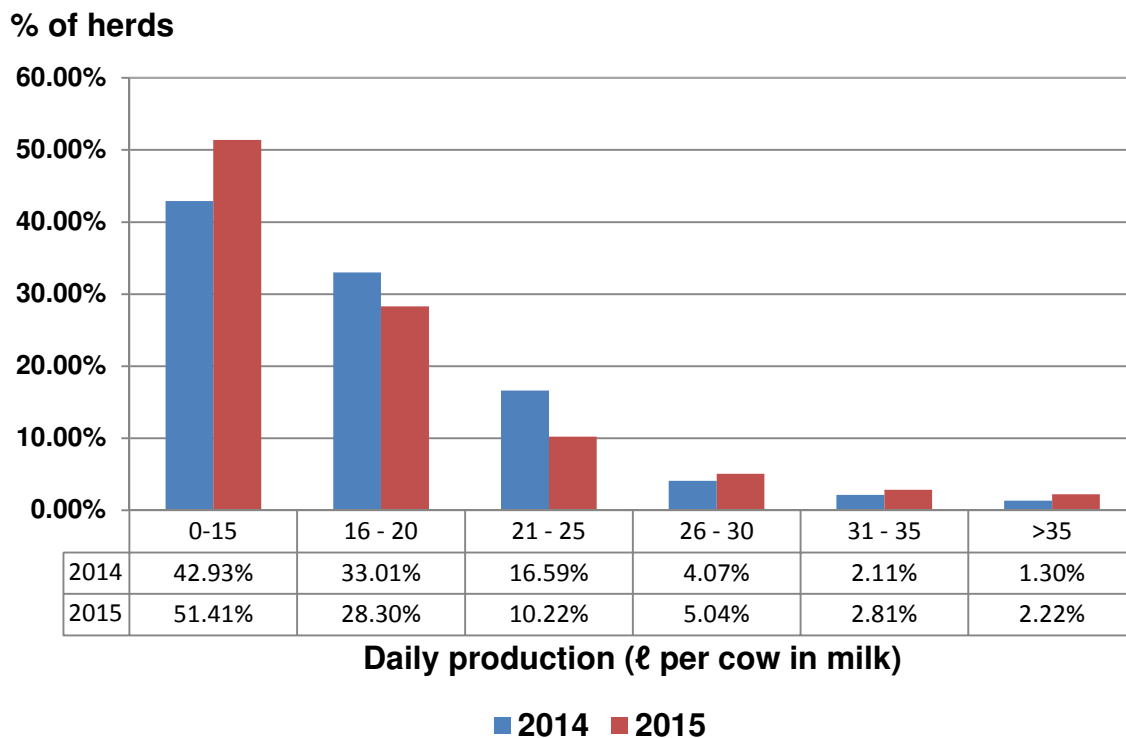
Province	Average milk production per cow in milk per day (L/day)	
	2014	2015
North West	17,7	16,0
Free State	17,8	14,6
Mpumalanga	22,0	16,6
Northern Cape	18,8	15,9
Limpopo	32,7	23,8
Western Cape	18,9	16,4
Gauteng	18,9	14,2
KwaZulu-Natal	19,9	17,8
Eastern Cape	22,5	16,9
Total	20,4	17,3

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

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

Production/day (L)	% of herds 2014	% of herds 2015
0-15	42,9%	51,4%
16 - 20	33,0%	28,3%
21 - 25	16,6%	10,2%
26 - 30	4,1%	5,0%
31 - 35	2,1%	2,8%
>35	1,3%	2,2%

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



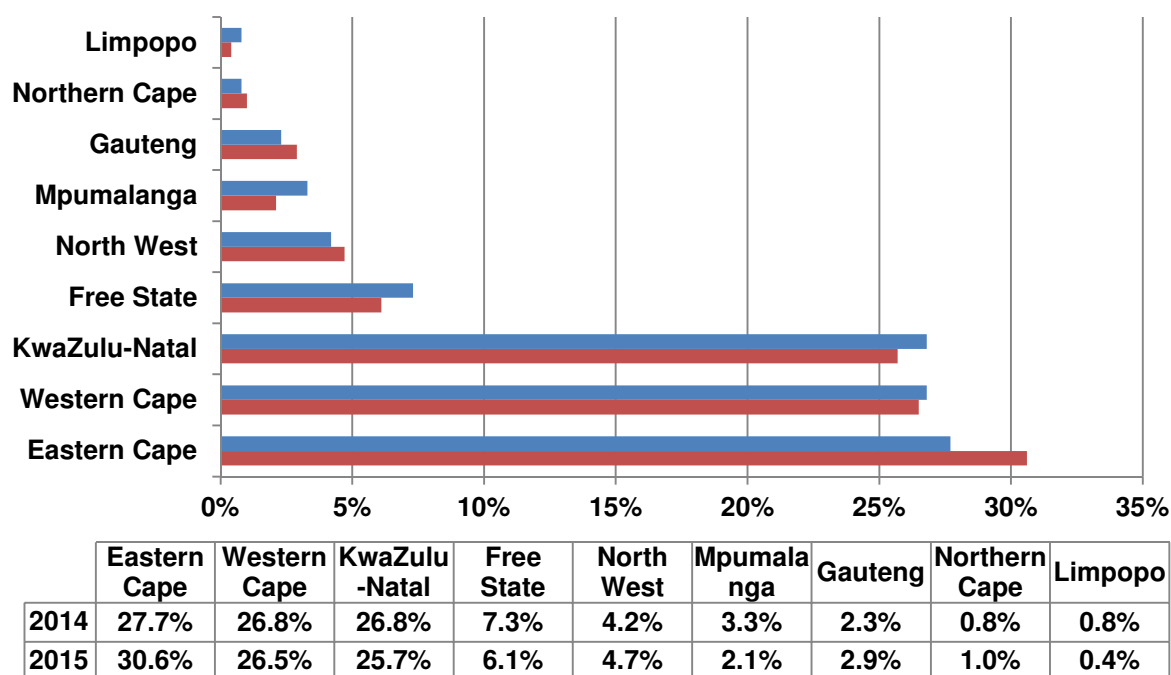
4. Geographical distribution of milk production

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 82% of total milk is produced in the three coastal provinces (2009 = 74%).

Table 10: Geographical distribution of milk production per province

Province	2012	2013	2014	2015
Western Cape	27,4%	26,4%	26,8%	26,5%
Free State	10,5%	9,5%	7,3%	6,1%
Eastern Cape	24,3%	26,8%	27,7%	30,6%
North West	3,5%	4,5%	4,2%	4,7%
Northern Cape	1,0%	0,9%	0,8%	1,0%
Mpumalanga	3,6%	3,3%	3,3%	2,1%
Limpopo	0,7%	0,9%	0,8%	0,4%
KwaZulu-Natal	23,5%	24,5%	26,8%	25,7%
Gauteng	5,5%	3,2%	2,3%	2,9%
Total	100,0%	100,0%	100,0%	100,0%

Figure 5: Milk production per province, 2014 & 2015



■ 2014 ■ 2015