



Report on a survey conducted during October and November 2016 in respect of information supplied by milk producers in terms of the requirements as published in Regulation 42 and 46 of 22 January 2016 in terms of the Marketing of Agricultural Products Act, 1996, Act No. 47 of 1996.

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1. Introduction

In terms of Regulation 42 and 46 of 2016 the Milk Producers' Organisation (MPO) is compelled to collect specific information from milk producers of raw milk production. This survey was carried out in October and November 2016. The survey was carried out amongst all milk producers registered as such with the MPO in terms of Regulation 42 of 2016. It consisted of an initial email survey, followed by two additional email surveys and a telephone survey with persons who initially failed to respond and producers without email contact. Incomplete questionnaires were followed up by telephone in December 2016 and January 2017. In total 574 responses (36,2%) could be used. The total response is compared with the number of registered producers per province in Table 1.

Table 1: Survey response and registered producers per province, November 2016

Province	Responders	%	Producers	%	Response % of producers
North West	83	14,5%	165	10,4%	50,3%
Free State	28	4,9%	249	15,6%	11,2%
Mpumalanga	69	12,0%	87	5,5%	79,3%
Northern Cape	2	0,3%	7	0,4%	28,6%
Limpopo	13	2,3%	15	0,9%	86,7%
Western Cape	131	22,8%	481	30,2%	27,2%
Gauteng	45	7,8%	98	6,2%	45,9%
KwaZulu-Natal	53	9,2%	247	15,5%	21,5%
Eastern Cape	150	26,1%	244	15,3%	61,5%
Total	574	100,0%	1 593	100,0%	36,0%

The response rate of the different regions varied between 11,2% and 86,7%. In the opinion of the Milk Producers' Organisation the information in this report provides a reliable overview of the typical structure of milk production in South Africa. Provincial information in provinces with a low response rate should be handled with care.

2. Herd¹ 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 the Eastern Cape and KwaZulu-Natal and the smallest in North West and Gauteng.

Table 2: Herd composition (numbers), average dairy herd per province, 2016

Province	Cows in milk	Dry cows	Heifers >1 year	Heifers < 1 year	Total
Eastern Cape	584	74	206	198	1062
KwaZulu-Natal	433	53	155	153	794
Western Cape	244	50	99	99	492
Limpopo	191	48	115	125	479
Free State	173	37	71	64	345
Northern Cape	168	37	59	57	321
Mpumalanga	149	45	59	53	306
Gauteng	127	52	55	47	281
North West	105	24	35	34	198
National herd ²	303	51	116	111	581

¹ A dairy herd is defined as a number of dairy animals being farmed on a separate farm, irrespective of its ownership

² The results for the total herd is calculated from the total response and not as the average of the different averages.

Table 3: Herd composition (%), average dairy herd per province, 2016

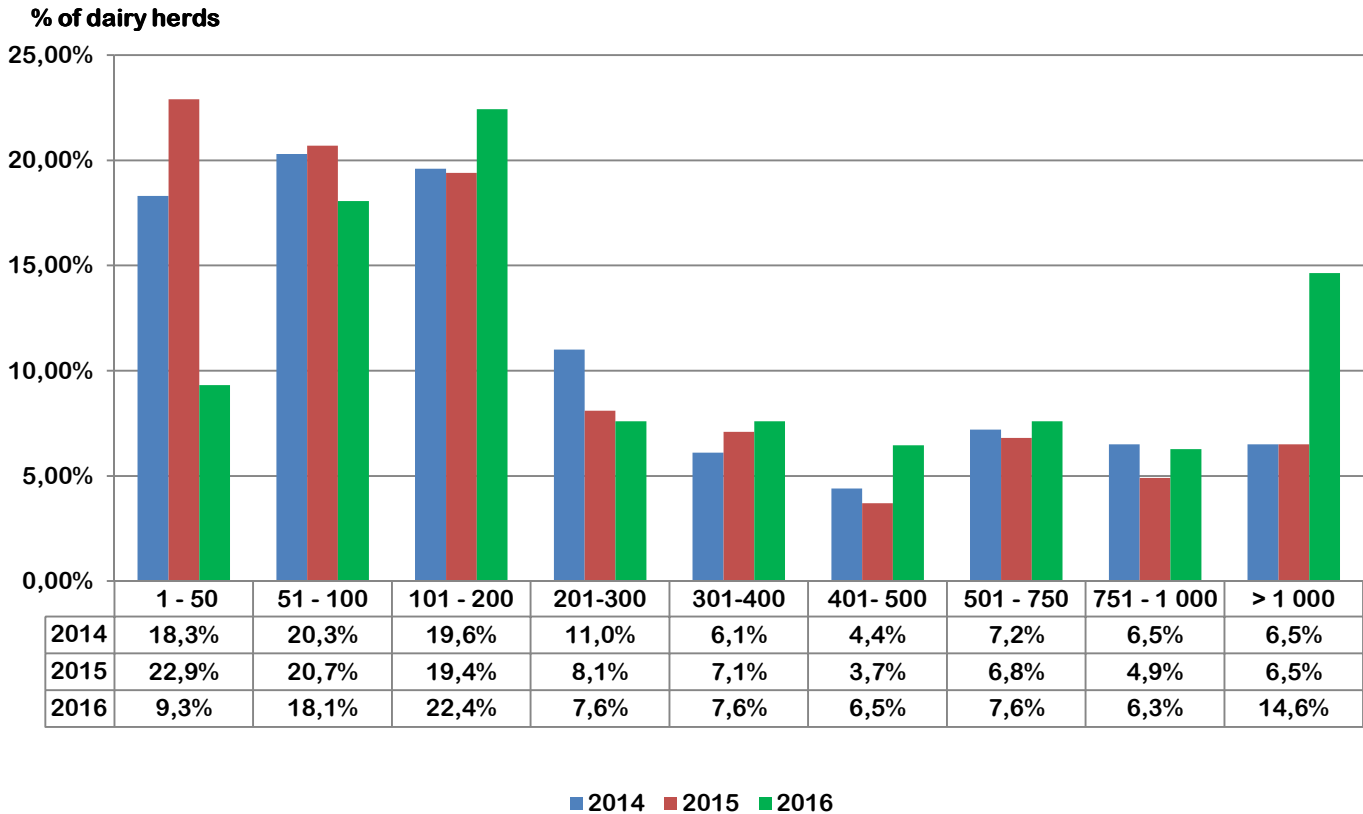
Province	Cows in milk	Dry cows	Heifers >1 year	Heifers < 1 year
Eastern Cape	55,0%	7,0%	19,4%	18,6%
KwaZulu-Natal	54,5%	6,7%	19,5%	19,3%
Western Cape	49,6%	10,2%	20,1%	20,1%
Limpopo	39,9%	10,0%	24,0%	26,1%
Free State	50,1%	10,7%	20,6%	18,6%
Northern Cape	52,3%	11,5%	18,4%	17,8%
Mpumalanga	48,7%	14,7%	19,3%	17,3%
Gauteng	45,2%	18,5%	19,6%	16,7%
North West	53,0%	12,1%	17,7%	17,2%
National herd	52,2%	8,8%	20,0%	19,1%

The distribution of dairy herds per herd size interval is shown in Table 4 and Figure 1. Fifty per cent of dairy herds comprise of 200 or fewer cows in herd while 28,5% of the herds have more than 500 cows.

Table 4: Distribution of dairy herds per herd size group (cows in herd), 2016

Cows in herd	% of herds			Cumulative % of herds		
	2014	2015	2016	2014	2015	2016
1 – 50	18,3%	22,9%	9,3%	18,3%	22,9%	9,3%
51 – 100	20,3%	20,7%	18,1%	38,6%	43,6%	27,4%
101 – 200	19,6%	19,4%	22,4%	58,3%	63,0%	49,8%
201–300	11,0%	8,1%	7,6%	69,2%	71,1%	57,4%
301–400	6,1%	7,1%	7,6%	75,3%	78,1%	65,0%
401– 500	4,4%	3,7%	6,5%	79,7%	81,9%	71,5%
501– 750	7,2%	6,8%	7,6%	86,9%	88,6%	79,1%
751– 1 000	6,5%	4,9%	6,3%	93,5%	93,5%	85,4%
> 1 000	6,5%	6,5%	14,6%	100,0%	100,0%	100,0%
Total	100,0%	100,0%	100,0%			

Figure 1: Distribution of herds per herd size group (cows in herd), 2014 - 2016

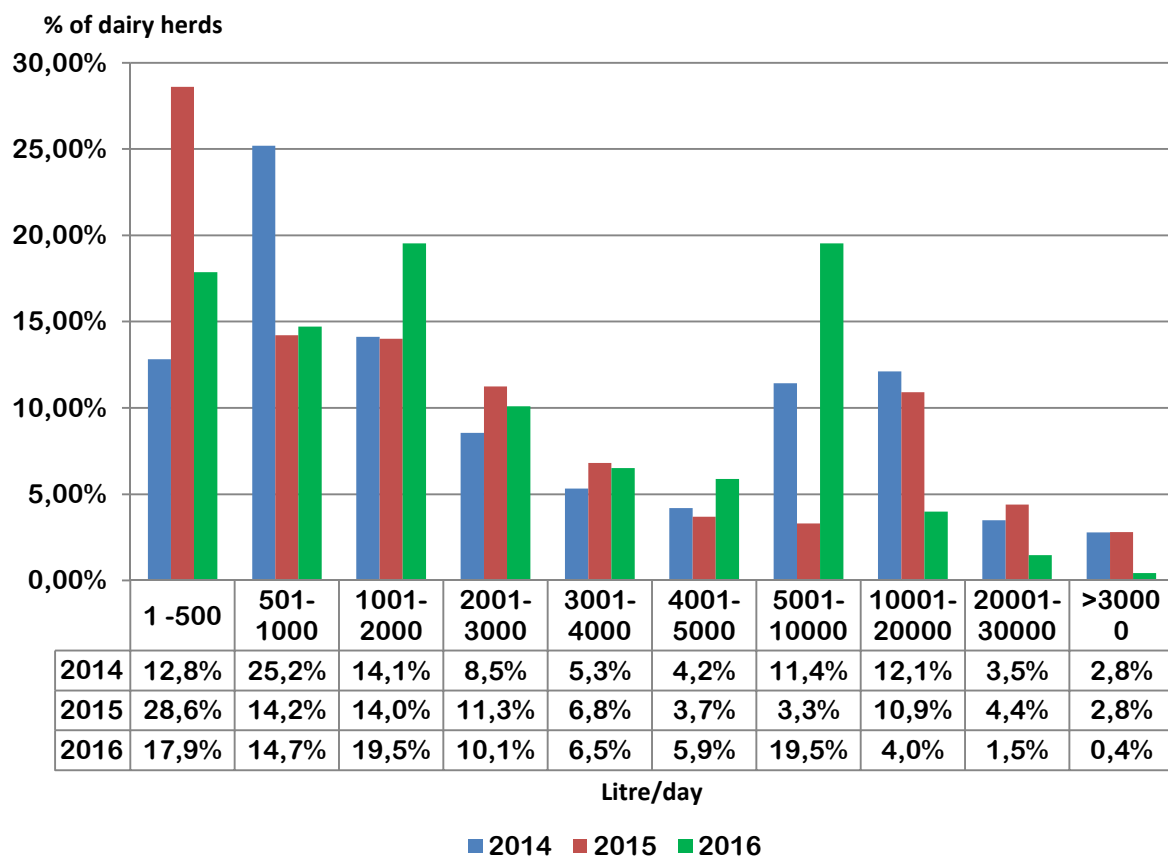


The distribution of herds based on total daily production per herd is shown in Table 5 and Figure 2. Sixty-two per cent of herds produce 3 000 £ and less per day and 31% produce more than 4 000 £ per day.

Table 5: Distribution of herds per production group, 2014 - 2016

Daily production l/day	% of dairy herds			Cumulative %		
	2014	2015	2016	2014	2015	2016
1 – 500	12,8%	28,6%	17,9%	12,8%	28,6%	17,9%
501– 1 000	25,2%	14,2%	14,7%	38,0%	42,8%	32,6%
1 001 – 2 000	14,1%	14,0%	19,5%	52,1%	56,8%	52,1%
2 001– 3 000	8,5%	11,3%	10,1%	60,7%	68,1%	62,2%
3 001 – 4 000	5,3%	6,8%	6,5%	66,0%	74,9%	68,7%
4 001 – 5 000	4,2%	3,7%	5,9%	70,2%	78,6%	74,6%
5 001–10 000	11,4%	3,3%	19,5%	81,6%	81,9%	94,1%
10 001– 20 000	12,1%	10,9%	4,0%	93,7%	92,8%	98,1%
20 001–30 000	3,5%	4,4%	1,5%	97,2%	97,2%	99,6%
>30 000	2,8%	2,8%	0,4%	100,0%	100,0%	100,0%
Total	100,0%	100,0%	100,0%	---	---	---

Figure 2: Distribution of herds per production group, 2014 - 2016



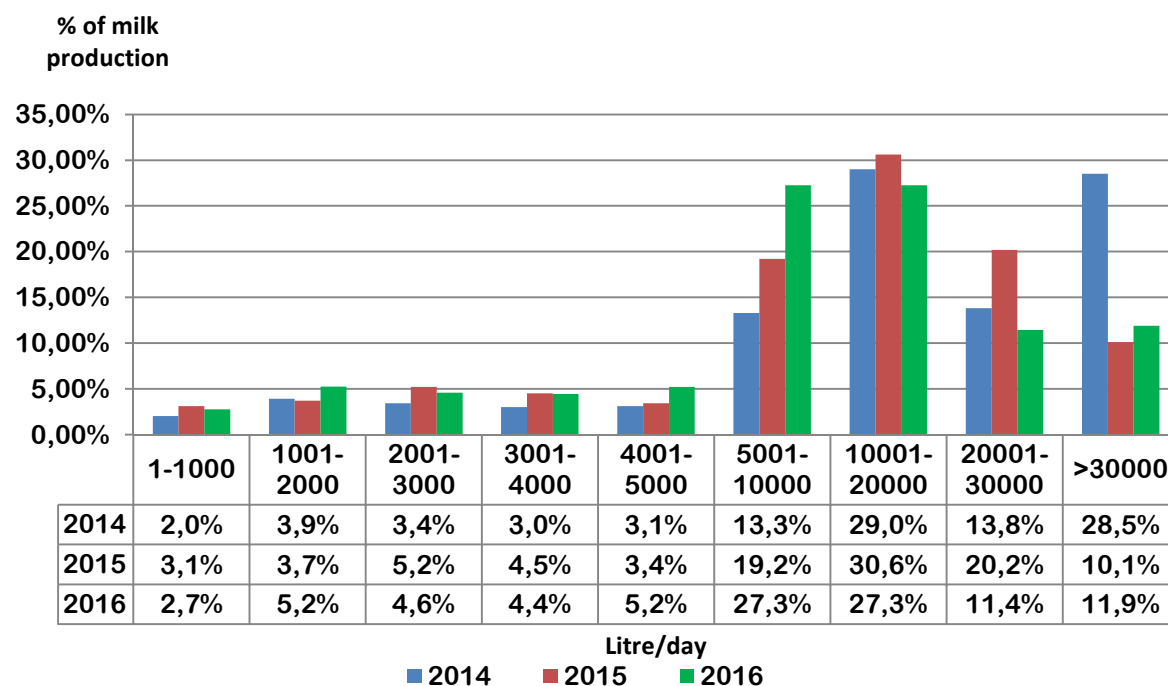
2. Milk Production

The share of total milk production per production class is shown in Table 6 and Figure 3. Large producers (producing more than 10 000 l./day) produce 51% of the total milk production.

Table 6: Milk production per production class, 2014 – 2016

Daily production	% of total milk production			Cumulative %		
	2014	2015	2016	2014	2015	2016
501–1 000	2,0%	3,1%	2,7%	2,0%	3,1%	2,7%
1 001–2 000	3,9%	3,7%	5,2%	5,9%	6,8%	8,0%
2 001–3 000	3,4%	5,2%	4,6%	9,3%	12,0%	12,5%
3 001–4 000	3,0%	4,5%	4,4%	12,3%	16,5%	17,0%
4 001–5 000	3,1%	3,4%	5,2%	15,4%	19,9%	22,1%
5 001–10 000	13,3%	19,2%	27,3%	28,7%	39,1%	49,4%
10 001–20 000	29,0%	30,6%	27,3%	57,7%	69,7%	76,7%
20 001–30 000	13,8%	20,2%	11,4%	71,5%	89,9%	88,1%
>30 000	28,5%	10,1%	11,9%	100,0%	100,0%	100,0%
Total	100,0%	100,0%	100,0%			

Figure 3: Milk production per production class, 2014 -2016



Daily average production and utilisation of milk per dairy farm 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	Delivered to market	On-farm use	% Delivered
Eastern Cape	5 821	5 703	118	98,0%
KwaZulu-Natal	3 795	3 709	86	97,7%
Western Cape	2 858	2 814	44	98,5%
Limpopo	2 636	2 579	57	97,8%
Free State	3 437	3 411	26	99,2%
Northern Cape	802	774	28	96,5%
Mpumalanga	2 018	1 981	37	98,2%
Gauteng	1 520	1 486	34	97,8%
North West	2 036	1 997	39	98,1%
National herd	3 468	3 402	66	98,1%

Average daily milk production per cow in milk per day is shown in Table 8.

Table 8: Average daily milk production per cow in milk per province, 2016

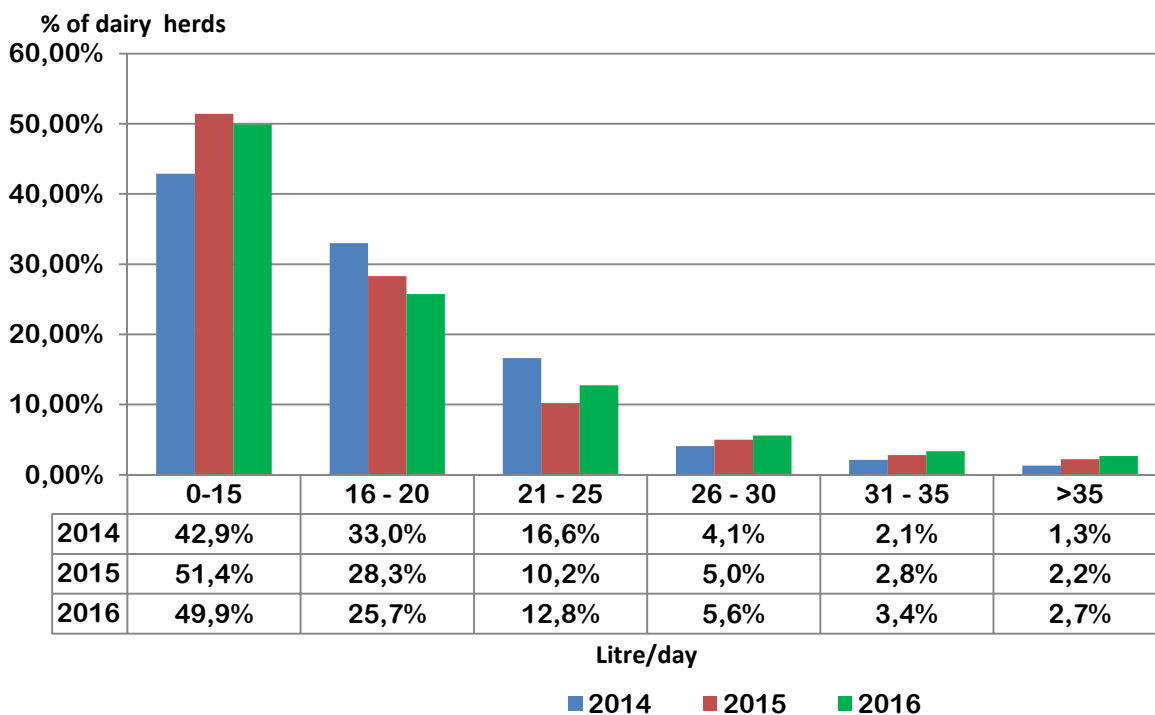
Province	Average Production ℓ/cow/day
Eastern Cape	18,40
KwaZulu-Natal	18,10
Western Cape	19,00
Limpopo	14,10
Free State	19,90
Northern Cape	15,30
Mpumalanga	21,50
Gauteng	21,70
North West	21,50
National herd	18,00

The distribution of herds based on average milk production per cow per day is shown in Table 9 and Figure 4. Eighty-eight per cent of herds have an average daily production per cow in milk of less than 26 ℓ.

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

Production/day (ℓ)	% of herds 2014	% of herds 2015	% of herds 2016
0 – 15	42,9%	51,4%	49,9%
16 – 20	33,0%	28,3%	25,7%
21 – 25	16,6%	10,2%	12,8%
26 – 30	4,1%	5,0%	5,6%
31 – 35	2,1%	2,8%	3,4%
>35	1,3%	2,2%	2,7%

Figure 4: Herd distribution based on average production per cow in milk per day, 2014-2016



4. Geographical distribution of milk production

The geographical distribution of total milk production based on received questionnaires and on additional information received from milk processors 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	2013	2014	2015	2016
Western Cape	26,4%	26,8%	26,5%	30,6%
Eastern Cape	26,8%	27,7%	30,6%	28,4%
KwaZulu-Natal	24,5%	26,8%	25,7%	23,7%
Free State	9,5%	7,3%	6,1%	6,8%
North West	4,5%	4,2%	4,7%	4,5%
Mpumalanga	3,3%	3,3%	2,1%	2,6%
Gauteng	3,2%	2,3%	2,9%	2,5%
Limpopo	0,9%	0,8%	0,4%	0,5%
Northern Cape	0,9%	0,8%	1,0%	0,4%
Total	100,0%	100,0%	100,0%	100,0%

Figure 5: Milk production per province, 2014- 2016

