

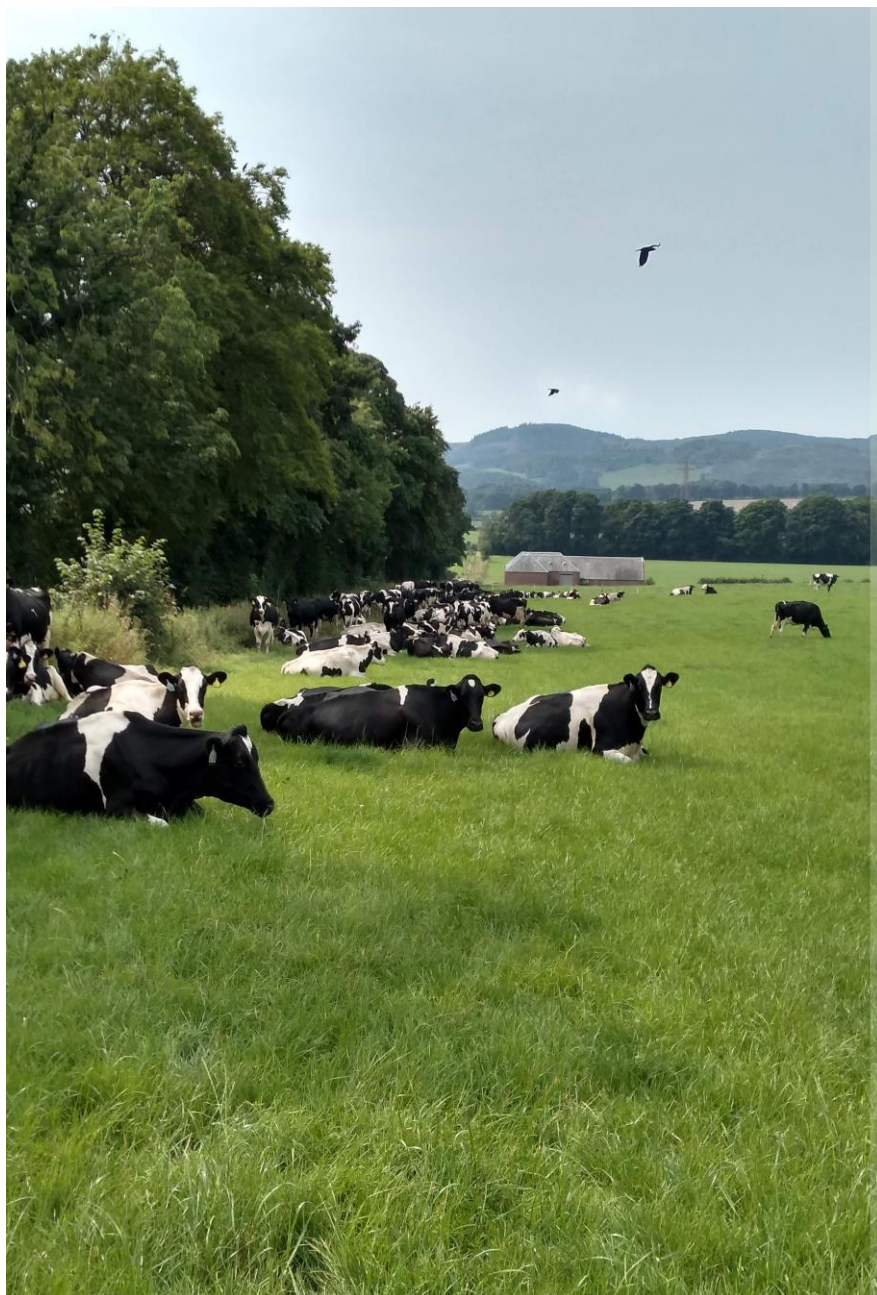
Issue 55 | July 2023

Milk Manager NEWS



**Farm
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Lorna MacPherson	



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Milk Market Update

UK Wholesale Dairy Commodity Market

- Fonterra's latest on-line GDT auction (4th of July) resulted in a 3.3% decrease in the weighted average price across all products, reaching US \$3,334/t. There was no change in the GDT price index at the previous auction on the 20th of June. At the most recent auction, all products sold were back in price, with butter milk powder (BMP) and butter being the biggest movers. BMP was down 11.4% to \$2,189/t and butter was down 10.3% to \$4,842/t. Full results are available at <https://www.globaldairytrade.info/en/product-results/>
- Domestic ex store prices for dairy commodities have rallied slightly, with no negative average price movement over the May/June reporting period.

Commodity	Jun 2023 £/t	May 2023 £/t	% Difference Monthly	Jun 2022 £/t	% Diff 2023-2022
Bulk Cream	£1,622	£1,490	+9	£2,734	-41
Butter	£3,990	£3,910	+2	£6,020	-34
SMP	£2,060	£2,040	+1	£3,380	-39
Mild Cheddar	£3,560	£3,550	0	£4,740	-25

Source: AHDB Dairy - based on trade agreed from 22nd May - 19th Jun 2023. Note prices for butter, SMP and mild cheddar are indicative of values achieved over the reporting period for spot trade (excludes contracted prices and forward sales). Bulk cream price is a weighted average price based on agreed spot trade and volumes traded.

- Cream showed the biggest increase in average price throughout the month, despite subdued demand from the continent on the back of the pound strengthening against the euro and adequate supplies on the continent. Since the end of April the domestic cream price has risen by 7%.
- Butter was up 2% on the previous month, even though availability was reported to be good with little demand, and Irish butter being sold cheaply on the back of storage problems.
- The domestic SMP price showed little movement from the previous month, despite SMP being down 6% at the latest GDT auction, due to weak global demand. However, milk powders in the EU are up by around 4% since

the end of April on the back of little growth in milk output.

- The market indicators AMPE and MCVE have firmed slightly for June, up 0.65ppl and 0.14ppl respectively from May. AMPE (Actual Milk Price Equivalent) indicates the value of milk used for butter and SMP production and is on average just over 3ppl below the current standard liquid litre (non-aligned) prices from the main Scottish milk buyers. There is less of a difference between the MCVE (Milk for Cheese Value Equivalent) price and the current prices dairy farmers are receiving with a manufacturing contract (with MCVE being about 1.3ppl less).

	Jun 2023	May 2023	12 months previously	Net amount less 2.4ppl average haulage – Jun 2023
AMPE	32.66ppl	32.01ppl	56.43ppl	30.26ppl
MCVE	37.59ppl	37.45ppl	54.09ppl	35.19ppl

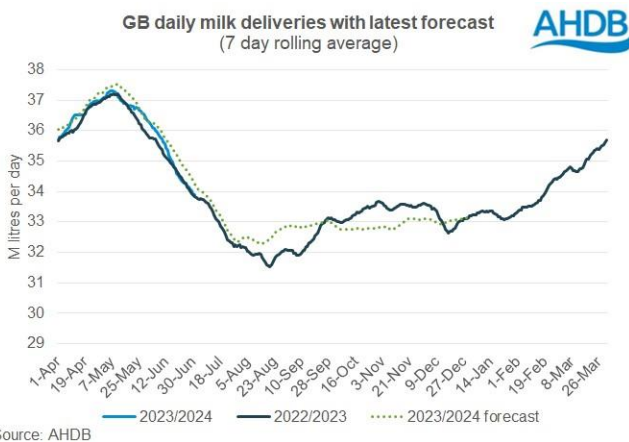
Source: AHDB Dairy

- The Milk Market Value (MMV) of milk has remained fairly steady over the last three months, at 36.60ppl for June, 36.36ppl for May and 36.42ppl for April. As farm-gate prices tend to mirror MMV prices in three months' time, this implies that milk prices have steadied and with the spring flush well past, are unlikely to fall much further.
- Defra put the UK average farm-gate milk price at 37.58ppl for May 2023, down 1.89ppl (4.8%) from April and 7.8% lower than May 2022. The UK volume for May was 1,379 million litres, which was 3.3% higher than the previous month and 0.3% less than May 2022.
- Based on current prices and market returns, The Dairy Group predicts that the Defra farm-gate milk price will remain stable over the summer months, to 37.5ppl in June, 37.3ppl in July and 37.7ppl in August. AMPE looks to remain stable in the short-term at 32-33ppl and so B litres should be in the region of 30-31ppl. Longer term, it is thought that milk prices will improve slightly for the coming winter. The milk price:feed price ratio is currently very low but should improve slightly in the winter period with lower feed prices, but this may not be enough to stimulate more milk output.

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GB Milk Deliveries and Global Production

- For the week ending 1st July deliveries were down 1.1% on the previous week, with a daily average of 33.89 million litres/day. Deliveries are now just 0.2% above the same week in 2022, equating to an extra 60,000 litres/day but are still behind forecasted levels.



- Global milk production has been increasing, with an average 835 million litres/day produced in April compared to 815.8 million litres/day in March (up 2.4%). Out of the seven key producing regions, only Australia recorded a production decline in April compared to 12 months ago, with deliveries back 1.7%. The biggest increase was seen in New Zealand, up 6.8% on April 2022 but there was the seasonal decline on the previous month (back 16%) as they enter their winter period. Increases in milk output for the US and EU were modest at only 0.3% and 0.4% respectively compared to April 2022. Countries in the EU showing the biggest increases in production were Belgium (+3.8%), Germany (+3.3%) and the Netherlands (+3.3%).

Other News

- It is estimated that the breakeven price to produce milk is currently around 40-41ppl (Kite Consulting) and the majority of non-aligned milk contracts are paying well below this. However, it is thought that milk prices are not likely to rise significantly until the last quarter of the year in part due to low global demand for dairy products.
- Dairy farmers are being encouraged to complete the Dairy Production Intentions Survey recently launched by the NFU. The aim

of the survey is to find out producers plans for milk production over the next two years to help predict future milk output in response to high input costs and low milk prices. The survey should be completed by 23rd July and can be found here:

<https://www.nfuonline.com/updates-and-information/take-part-in-our-2023-dairy-production-survey/>

- A milk price cut has already been announced by Müller from 1st August. Direct suppliers will see their milk price fall by 1ppl to 37ppl (36.75ppl including the Scottish haulage charge).
- A recent survey by Arla has shown that 58% of dairy farmers are finding sourcing labour more challenging now compared to in 2019. Twelve percent of farmers surveyed said they were considering leaving the industry due to staffing concerns, despite wages having increased on average by 22% since 2019.

Monthly Price Movements for July 2023

Commodity Produced	Company Contract	Price Change from June 2023	Standard Litre Price July 2023
Liquid & Cheese	Arla Farmers UK	<i>No change</i>	33.74ppl liquid 35.12ppl manufacture
Cheese, Liquid & Brokered Milk	First Milk	<i>-1.04ppl</i>	36.85ppl manufacture
Cheese	Fresh Milk Company (Lactalis)	<i>-0.31ppl liquid -0.31ppl manufacture</i>	35.19ppl liquid 36.94ppl manufacture
Liquid & Manufacture	Grahams	<i>No change</i>	36.0ppl
Liquid & Manufacture	Müller Direct	<i>-2.0ppl</i>	37.75ppl (includes 1ppl direct premium & -0.25ppl Scottish haulage charge)
Liquid & Manufacture	Müller (Co-op)	<i>-0.93ppl</i>	41.22ppl
Liquid & Manufacture	Müller (Tesco)	<i>No change</i>	43.51ppl
Liquid, Powder & Brokered	Yew Tree Dairies	<i>-1ppl</i>	37ppl Standard A litre price

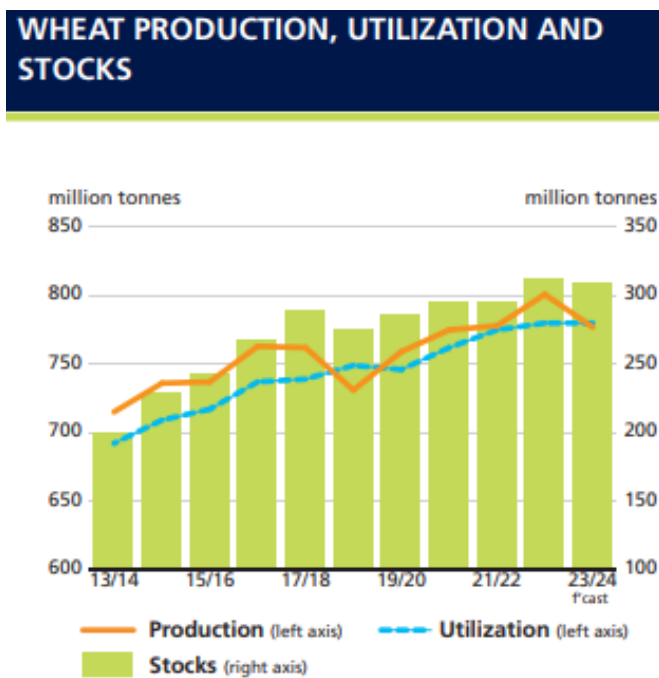
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Straights Update

Global and Domestic Cereals Outlook

Global wheat production, stocks and trade (Figure 1) are all forecast to fall in 2023/24 from their 2022/23 record high levels. Nevertheless, with significant carryover stocks from last season and nearly stagnant total utilisation, world wheat supplies are set to remain unchallenged. Global wheat markets are expected to tighten slightly in 2023/24 but should remain adequately supplied. Total wheat output in 2023 is pegged at 777 million tonnes, representing a 3.0% fall from the all-time high reached in 2022. The bulk of the foreseen decline is expected to occur in the Russian Federation and Australia, following record-high outputs in both countries in 2022, while smaller declines are anticipated in several other leading producers, including Ukraine.

Figure 1: Global production, use and stocks of wheat over the past 10 years.



Source: FAO

Through to late June, we saw a real acceleration of grain prices to the upside driven by reports confirming downgrades to maize and spring wheat crops, primarily in the USA.

UK prices continued their rebound too, however this month so far, global grain markets have pulled back as US crop condition scores climbed on the back of

widespread rains across the Midwest. UK Nov 23 wheat futures sat at £193.75/t as of 11th July, having lost much of the earlier gains in the preceding month.

Australian wheat areas are expected to dry out in July and could add to concerns over global weather hotspots. Reports that India's production will be much lower than government estimates will be watched closely as well. If true, it could turn India, like China, into a net importer later this year, tightening the global balance sheet and becoming a new bullish factor.

The UK malting barley market has been the biggest riser of all over recent weeks, with significant premiums quoted on high-N brewing contracts. However, with the onset of an optimistic harvest in France and recent rains here, the rally may well be running out of steam. Sellers of winter barley for export continue to face aggressively priced barley of Black Sea origin.

£/tonne	Basis	July 23	Harvest 23	Nov 23
	Ex farm Scotland	180	185	192
	Ex farm Scotland	160	160	165
	Ex farm Scotland			245-300
	Delivered Dundee	360	358	368

Sources: Gleadall, United oilseeds, Bloomberg

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Milk Feeding Management of Dairy Heifer Calves

Maximising growth rates of dairy heifer calves during the milk feeding phase is important to get calves off to a good start in life. While they tend to be fed on a restricted regime, feeding higher levels of milk has been shown to benefit weaning weights, with lower disease incidence and longer-term, more milk produced in their first lactation.

Dairy heifer calves are typically fed in the region of 750-900g of calf milk replacer (CMR) per day. However, some farmers are now looking at feeding rates of more than 1.2kg CMR/day and 8 litres plus, as opposed to the more typical 6-7 litres of milk/day.

Naturally, calves can drink up to 20% of their body weight when left to suckle their dam (or when offered milk ad-lib) and achieve growth rates of over 1kg/day, much higher than the suggested 0.8kg/day target suggested for Holstein-Friesian calves. For a 50kg calf, 20% of bodyweight means a daily intake of 10kg of milk, which is significantly more than is typically fed in a bucket rearing system or through automatic calf feeders.

While these more restricted levels of milk feeding are beneficial to encourage starter feed intake which is important for rumen development and post-weaning feed intake, the growth potential of calves is not maximised on this system.

It is well documented that feeding elevated levels of milk in early life results in higher liveweight gains with heavier calves at weaning. These calves also show superior organ growth and development (of the rumen, small intestine and mammary gland), with more milk produced in their first lactation. For example, research from numerous US studies showed that for every 1kg increase in average liveweight gain pre-weaning, heifers produced up to 1000kg more milk in the first lactation.

For farmers looking to increase milk feeding rates, weaning will need to be carefully managed so that sufficient starter feed intake is consumed for good rumen development and feed intake post-weaning, once milk is no longer fed. A longer step-down period of milk may be required, i.e. a more gradual weaning period, and the higher the level of milk being fed, the longer the weaning period should be.

Over the last 5 months, calf management at SRUC's Crichton Royal Farm in Dumfries has changed dramatically, with calves now weaned at 12 weeks of age and being fed up to 9.5 litres of milk. This is in comparison to the previous system of weaning at 8 weeks and a maximum rate of 7 litres of milk. Other changes are:

- Following one 4-litre of feed of colostrum, calves previously went straight onto CMR. They were housed in individual pens for 7 days before moving into group igloo housing and fed through an automatic feeder, up to 7 litres of milk at 15% CMR inclusion (1.05kg CMR/calf/day).
- Now, following their one feed of colostrum, calves are fed cow's transition milk up to 7.5 litres for the first 14 days in individual pens. On

day 15 they are moved to group housing where the level of milk fed is increased up to 9.5 litres (with 13.5% CMR inclusion so 1.28kg CMR/calf/day).

- Weaning age has moved from 8 weeks to 12 weeks of age, with the weaning process starting at 67 days of age.
- The CMR has changed from a whey-based (24% protein, 20% oil) to a skim-based product (22.5% protein, 25% oil).

The target weaning weight is now a minimum of 110kg, with some calves being weaned at 130kg when 12 weeks old. As a result of these changes, growth rates have improved by 0.3kg/day, from 0.65-0.7kg/day to 0.95-1kg/day. Other benefits include lower treatment rates for scours and pneumonia.

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Keeping Mastitis Under Control in Summer

Mastitis is one of the biggest causes of economic loss in the dairy herd and can be even more prevalent during the grazing season. Exposure to new bacterial pathogens and changing environmental conditions can increase the risk of infections occurring. Figures from Kingshay suggest that an average case of mastitis in a lactating animal costs £386. Furthermore, the annual emergence of nuisance flies can lead to summer mastitis infections, particularly in non-lactating cows and heifers.

Mastitis occurs when bacteria enter the udder (usually via the teat canal) and infect the mammary tissue. Clinical symptoms include a hot, swollen and painful udder, clots in the milk and loss of production. Sick animals may have a high temperature, loss of appetite and become isolated from the group. Severe cases can cause permanent udder damage and lost quarters. Subclinical infections generally go unnoticed and are usually only detected through routine milk sampling.

Causes

- 1) Housing: Dirty bedding and soiled passageways can harbour harmful bacteria including *Streptococcus uberis* and *E. coli*.
- 2) High temperatures: Heat stress can compromise the immune system of the cow, making her more susceptible to infection.

- 3) Poor hygiene practices: Poor sanitation of teats and milking equipment can increase cow-to-cow transmission, particularly by contagious pathogens such as *Staphylococcus aureus*.
- 4) Flies: The sheep head fly (*Hydrotoea irritans*) is responsible for transmitting the bacteria *Trueperella pyogenes*, known to be the main cause of summer mastitis. The fly is most active in July, August, and September.
- 5) Teat damage: Cracked or sore teats are more likely to attract flies. Damaged teat ends are less effective at preventing bacteria from entering the teat canal.

Treatment

Intramammary antibiotics are typically used where the infection is mild. Injectable antibiotics are used in more severe cases alongside anti-inflammatories to counteract swelling and reduce temperature. Pre-milking the infected quarter prior to treatment is advised to enable the antibiotic tubes to reach a larger area of the udder. In extreme cases, teats may need to be split open to drain the udder of infection. Toxic mastitis cases will require fluid therapy and immediate veterinary attention. It may be advisable to obtain a milk pathogen test to identify the cause of the infections and the most effective treatments.

Prevention

- 1) Keep cubicles and lying areas clean and dry. Frequently scrape passageways to avoid muck pooling. Trim tails and udders. Dirty tails will fling manure around the building when cows are irritated by biting flies. Rotate pastures frequently to avoid a build-up of bacteria.
- 2) Ensure cows are given adequate shelter, ventilation, and access to water at all times to minimise heat stress.
- 3) Pre-dip and wipe teats prior to milking, paying particular attention to the teat end. Carry out routine milk sampling to identify high somatic cell count animals and treat accordingly. The California Milk Test can be used to identify problem quarters. Disinfect clusters between each animal to prevent transmission. Dry cow therapy should be administered in as sterile conditions as possible and teat sealants should be used in conjunction with antibiotics. Repeat antibiotic treatments may be required with extended dry periods. Vaccinations can also be used to help prevent *E.coli* infections.
- 4) Avoid grazing near wet areas and woodland. Control flies using pour-ons. Treatments should

be repeated every 4-8 weeks for maximum effect. Apply half the dose to the udder area (using gloves) for better coverage. Stockholm tar, although messy, could be used on farms with a history of summer mastitis. Parasitic wasps can be released to reduce the fly population and disrupt the breeding cycle.

- 5) Regularly maintain milking equipment to prevent over-milking, which can lead to teat damage. Use conditioning teat dips and udder balms to prevent dry cracked skin.

Good management practices, hygiene, fly control, and routine milk sampling can reduce the incidence of mastitis during the summer months. When incidences do occur, it is important to work with a veterinarian to identify the main causes in order to administer the most appropriate treatments.

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Sharing Best Practice from an Organic Dairy

Since fertiliser prices rocketed in 2021, the Stranraer Sustainable Group of dairy farmers (part of the FAS Connect Programme) has been assessing their use of inorganic fertilisers to reduce their reliance on them and maximise the potential of the nutrients available in their slurry. They were also keen to learn lessons from organic dairy farmers who are producing high yields of grazing and silage grass with no inorganic Nitrogen applications and so the group visited Wigtown dairy farmer Andrew Robinson, who milks 320 cows on around 700 acres. The meeting focused on the use of legume crops to grow grazing grass, grass silage and arable silage.

White clover in grazing paddocks



Depending on soil fertility, structure and use of inorganic Nitrogen, grazing swards with a clover content of 30% have the ability to fix up to 180kg N/ha (the equivalent of applying 665kg/ha of 27% Nitrogen.) Spray programmes for common field weeds and high Nitrogen applications have traditionally meant that the clover content of grazing paddocks on dairy farms has been low. Reintroducing clover to a grazing sward will not only fix nitrogen but will also increase the protein content of the diet. Clover has a typical crude protein (CP) content of 27% compared to ryegrass at 17%, and provides a higher level of certain minerals (calcium, phosphorus, copper & selenium) than grass alone. When the clover content in grazing swards is very high, steps should be taken to reduce the risk of bloat.

Red clover in silage swards



Red clover is an integral part of the sward composition in any organic silage system, having the potential to fix 200kg N/ha (30% red clover in the sward). This is the equivalent of applying 500kg/ha of 40% protected urea, which matches the N recommendation for a 2-cut silage system. Although not as high in CP as white clover at 14-19%, it contributes a significant amount of protein to a ration when compared to ryegrass. Weed control in silage fields is a concern for many dairy farmers but most effective spray programmes for docks will also kill out the clover. Andrew has a greater tolerance for docks as he appreciates the greater benefits that red clover brings to the sward and manages docks by preventing them from flowering and shedding seeds.

Legume crops to support arable silage and reseed



To establish a reseed, Andrew undersows an arable silage crop with grass. The arable silage is typically a mix of peas and spring barley. Peas have the potential to fix up to 200kg N/ha, and again when used alongside slurry, more than meets the demands of the barley and grass crops in their Nitrogen demand. On demonstration plots in the local area run by Agrii, wholecrop peas and spring barley were grown successfully and yielded up to 31t /ha (fresh weight) with only 25t/ha separated solids applied before ploughing. An arable silage mix of peas and barley should have a CP content of around 13-16%. The dense canopy of an arable silage mix also acts to suppress weeds, with any annual weeds removed at harvest.

The farm walk proved a valuable learning experience for the group, some of whom have been trialling spring beans for wholecrop. Seeing in practice the quality and quantity of forage crops which can be grown with little or no nitrogen input has given them the confidence to try and apply some of these management practices on their own farms, to not only reduce Nitrogen use but also improve the protein content of their rations from home-grown forage.

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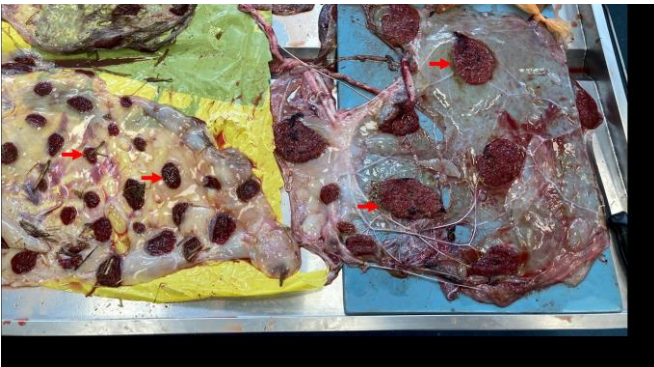
Small Calf Syndrome (SCS)

SRUC Veterinary Services at St Boswells have recently been investigating the occurrence of unusually small calves from five spring calving suckler herds in the area. The affected herds have either had these calves aborted in late pregnancy, stillborn or born alive. While the calves look normal and in proportion, they are small and thin, with poor muscle mass and tend to weigh less than 20kg.

At the moment, the cause of these small calves is unknown, but it is not thought to be a result of infectious disease. The placenta of affected calves appears abnormal, with a white surface and fluid accumulation between the layers of the placenta typically seen.

The photos below show the placentae from an SCS calf on the left and a normal placenta on the right. The red arrows indicate the cotyledons, which are much smaller in the abnormal placenta.

An abnormal placenta from a small calf (LHS) and a normal placenta (RHS)



Other observations from affected calves include thick amniotic membranes, which are difficult to break at calving. Investigations are on-going and it is thought that this issue is related to placental development and maternal nutrition and environment around the time when cotyledons are developing and rapidly increasing in number, typically in the first two months of gestation.

The following picture shows newly born, live twin calves, one of which was of normal size at around 40kg, but its twin was an SCS calf weighing only around 20kg.



So far, all cases of SCS have been found in suckler herds but we are keen to hear whether this issue has been seen in any dairy herds. If you suspect you have had any unusually small calves born (or late aborted/stillborn calves) we would be keen to hear from you to aid our investigations. Please contact Val Angus at val.angus@sac.co.uk with further information and your contact details.

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How Resilient is Your Dairy Farm?

As milk prices continue to drop, now is the time to consider whether your dairy business is resilient to survive the financial challenges that unexpected changes within the industry can bring. To maintain your business through these volatile periods, it is vital to plan for the future, re-evaluate budgets each year and save money where possible for the hard times. Looking ahead and planning for the business's future direction is important in ensuring that there is a level of security for the continuation of the business.

A good starting point is to look at how the business has performed over the past five years. Using the five-year average, you can begin to take a long-term look at the business over the next five years to ensure that it copes with the volatility in milk price, as well as the high and lows of variable costs which can greatly impact on cash flow. For the long-term vision, using the five-year average milk price will provide a realistic budget for income against estimated feed costs and other input costs which are not easy to predict far ahead.

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People are a key part of any business and having a professional workforce can improve performance and resilience of the farm. Developing and training your current staff can increase staff retention, whilst focusing on recruitment is key for future generations in the business. It is important to consider how the business will deal with absences and whether all staff can do the variety of jobs which may need to be covered if there are staff absences. Areas to consider include how easy is it for staff to find and follow protocols, and how effective is the communication between staff members. Ensuring your farm is a great place to work will aid in attracting good quality staff in the future.

Your herd of cows are also an important asset. Good management of the herd to attain a high health status will help protect your future return. Take time each year to re-evaluate your current herd health plan with your vet to determine if there are any areas or diseases that you need to focus on to improve the health status of the herd. Your cows are your working asset, and you must spend money and time on them to ensure the resilience and future of your business.

Climate change and more extreme weather patterns have put new pressures on farmers that can affect business resilience. Consider how you can prepare for future extreme weather events which can affect feed availability for the herd. Monitoring grass growth with a plate meter on a regular basis and recording the data can help you monitor grass availability and whether it meets demand throughout the year. Record data about the yield of crops and silage that are grown on the farm. Having this data means you can compare year-on-year growth rates and determine the quantity of feed the farm will have available for the winter or during dry summers when you may need to supplement. Have a back-up plan in case extra feed is required during a wet spring or dry summer. Has the farm got extra forage or do you need to budget in the cost of buying in forage or forage replacers in these situations?

Business resilience is a key part of ensuring your business is still performing in the future. Areas to consider and focus on include budgeting for the next five years, staff retention and recruitment, health status of the herd and feed availability. Considering these areas within your dairy business can help you determine where the strengths and

weaknesses are, providing opportunities to make it more resilient.

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Dates for Your Diary

- 12th July - **Dairy Beef Calf Systems: Managing Nutrition and Infectious Disease**. On-line meeting. Time 19.30-20.30. To register please visit: <https://us06web.zoom.us/j/89926332400?pwd=MGRMR29GNU5HVfJwci9VMSttcTdidz09>
- 19th July - **How do you consistently and successfully grow clover in West of Scotland?** Ardyne Farm, Dunoon, Argyll & Bute, PA23 7UJ. Time: 11.00. To book your place please contact doreen.anderson@ahdb.org.uk or call 07901 116 454.
- 20th July - **Holstein Scotland South Open Day**. Parkend Farm, Cowdenbeath, Fife, KY4 8EX. Time: 10.00. Please RSVP to parkendfarm@hotmail.com to confirm your attendance.
- 27th July - **Safe Use of Veterinary Medicines**. On-line course. For more information contact event organiser Embryonics on 01606 854411 or email: courses@embryonicsltd.co.uk
- 7th - 10th August - **Layscanning** (ultrasound scanning for farmers). For more information contact event organiser Embryonics on 01606 854411 or email: courses@embryonicsltd.co.uk
- 10th August - **RABDF/Gold Cup Open Day - Holehouse Farm, Ayrshire**. Holehouse Farm, Kilbirnie, KA23 7LA. Time:10.30am.
- 31st August - **AHDB D&G Strategic Dairy Farm - Potstown 2-year review**. Potstown, Lockerbie, Dumfries and Galloway, DG11 3EP. Time: 10.00-14.30. To book your place please visit: <https://ahdb.org.uk/events/dumfries-and-galloway-potstown-two-year-review-small-changes-for-big-results>

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- 31st August - **Safe Use of Veterinary Medicines.** On-line course. For more information contact event organiser

Embryonics on 01606 854411 or email: courses@embryonicsltd.co.uk

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