The South West Dairy Industry – A Vital Cog in the Economy

October 2016

The Rural Business School, Duchy College
for the South West NFU

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Foreword

Dairy farming is a key cog in the wheel of the rural economy in the South West, but all too often its enormous contribution goes unsung, buried in a blizzard of headlines about low prices and farmers getting out of dairy production.

Family farms of all kinds are critical to the social fabric of rural life, so this report was commissioned to provide a snapshot of the sector and show the enormous value in the supply chain, and beyond, that it delivers for the economy.

It graphically illustrates just how important dairy farmers are to the South West and if you take into account the value added to dairy products after they leave the region, and the other business interests many farmers have, the industry is worth even more than the £3.3bn identified in the report.

This has been achieved despite the challenges which currently face the industry, in particular continued problems with low commodity prices and the fight against bovine TB.

The presence of dairy farmers must not be taken for granted and they need to have a profitable future if we want to continue to see them generate millions of pounds for the economy.

Aside from the economic aspect, we mustn't forget how much farmers contribute to the environment and tourism by maintaining the countryside, and how they help sustain local communities.

This report underlines how important it is that the Government, Local Economic Partnerships, banks and other funding and infrastructure bodies continue to support the agricultural industry as we move towards Brexit.

It is a snapshot of a particular moment in the industry's history and we hope it will provide a platform for others to do similar work in the future and explore some of the issues in more depth.

Andrew Branton, chairman, South West NFU dairy board
October 2016

The South West Dairy Industry –

A Vital Cog in the Economy

OVERVIEW

The dairy industry is a very important contributor to the economy of South West England, with the region home to over 38% of England's breeding dairy cows (and 23.75% of the UK's) and 37% of England's dairy holdings and producers.

The number of cattle in the region has been steadily declining over recent years, a trend replicated nationally. However, the rate of decline in the South West has been much more gradual than the national picture, indicating that on the whole, the dairy industry in the South West is faring better than nationally (See Fig. 1). In 2013, the number of cows in the region was 423,205, compared to a figure of 465,775 in 2005, a drop of 9.14%. In England, the 2005 and 2013 figures were 1,275,562 and 1,112,198 respectively, a fall of 12.81%.

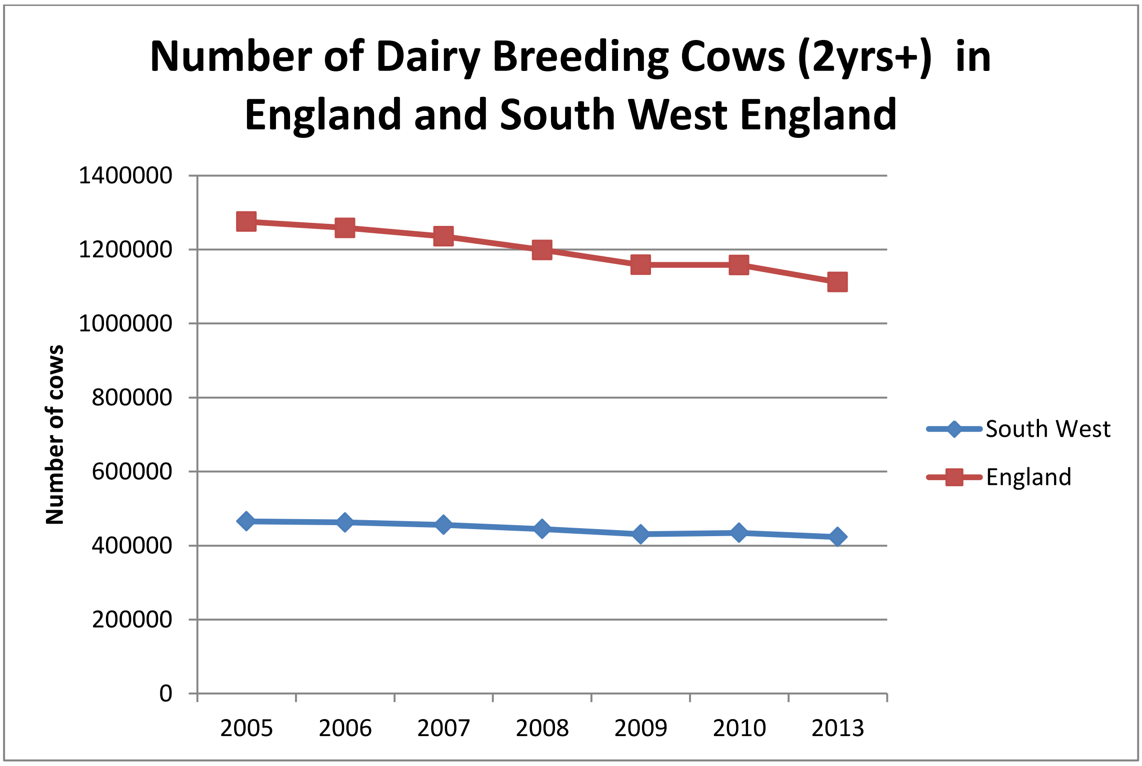

Figure 1: The number of dairy breeding cows (over 2 years old) in England and South West England, 2005-2013. Source: Cattle Tracing System (CTS), via AHDB Dairy.

The number of producers has also been in steady decline, with 14,968 dairy producers in England in 2002, compared to only 7,773 in 2016, a fall of 51.93%. This picture is mirrored in the South West, with a fall from 5,157 producers in 2002 to 2,885 in 2016, a fall of 55.94% (Fig. 2). However, the fall in the number of cows was smaller in the South West than in England as a whole, which would indicate that farmers in the South West are adapting by increasing herd sizes in response to market conditions.

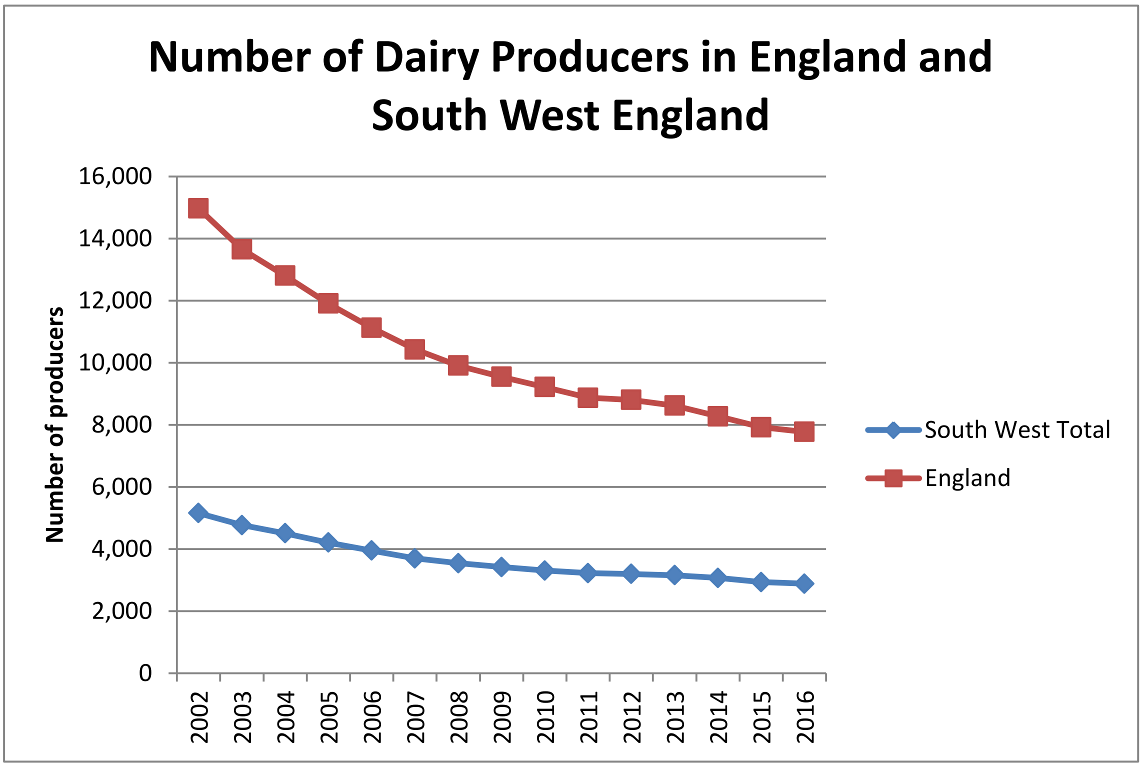

Figure 2: The number of dairy producers in England and South West England, 2002-2016. Source: Food Standards Agency (FSA), via AHDB Dairy.

The industry decline is also replicated in the number of dairy holdings, with a drop in England from 19,925 holdings in 2005 to 7,091 holdings in 2013, a fall of 64.41%. The fall in the South West is a little less at 61.19%, from 6,793 holdings in 2005 to 2,636 in 2013 (Fig. 3), which is further evidence that although the industry is in decline, the South West region is one of the more robust dairy areas.

PRODUCTION

In the 2014/15 milk year, the South West region produced over three billion litres of milk (3,346,926,074 litres), with Devon producing the largest volume, at 1,040,445,192 litres (Fig. 4). Taking the rolling average farmgate milk price for Great Britain in August 2016 of 22.94ppl, this equates to a farmgate value of milk produced in the region of **£767,784,841** per annum. The dairy industry therefore supplies almost £0.77bn to the region's economy in farmgate milk sales alone.

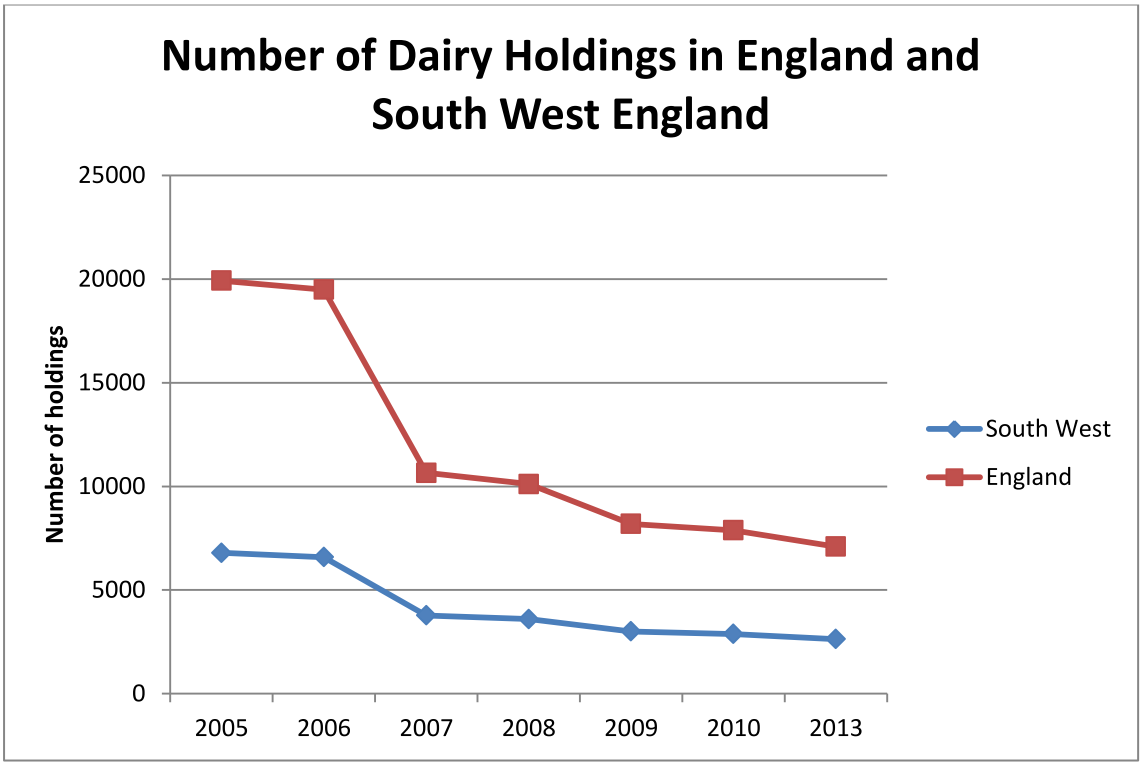

Figure 3: The number of dairy holdings in England and South West England, 2005-2013. Source: Cattle Tracing System (CTS), via AHDB Dairy.

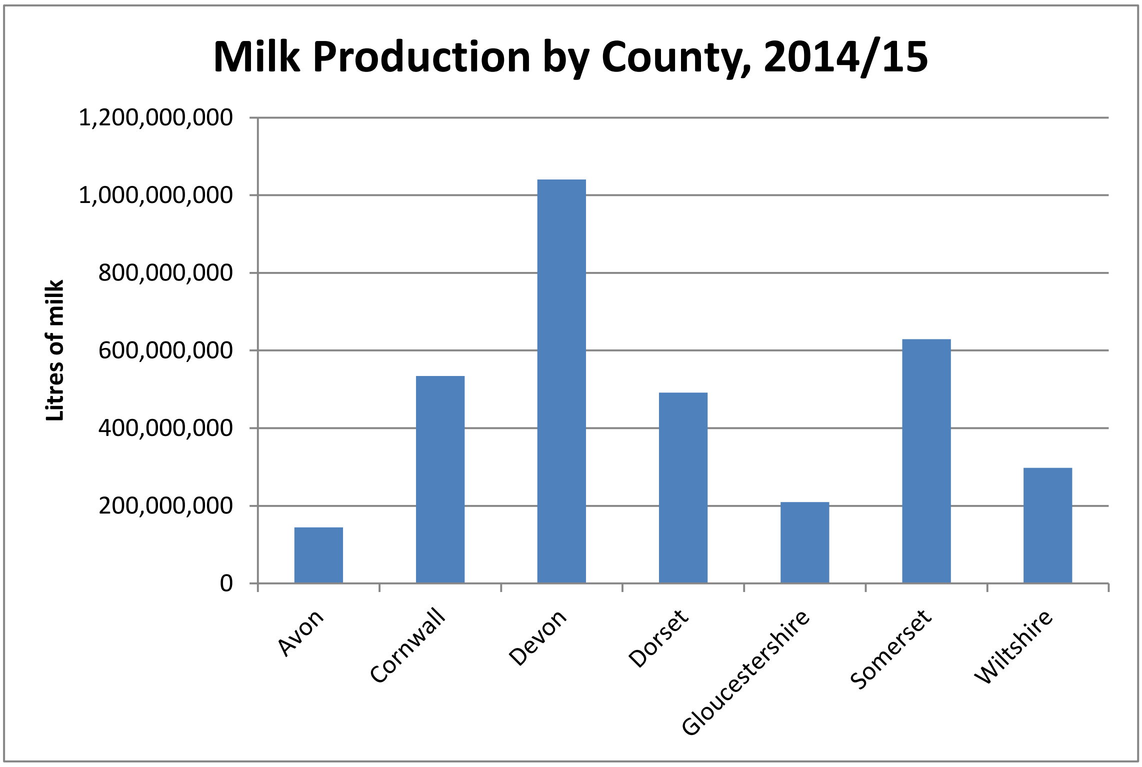

Figure 4: Milk production by county 2014/15. Source: RPA

In the 2014/15 milk year, the total UK milk production stood at over 14 billion litres, (14,394,000,000 litres). The South West figure of 3,346,926,074 litres per annum therefore represents almost a quarter (23.25%) of total UK milk production (Fig. 5).

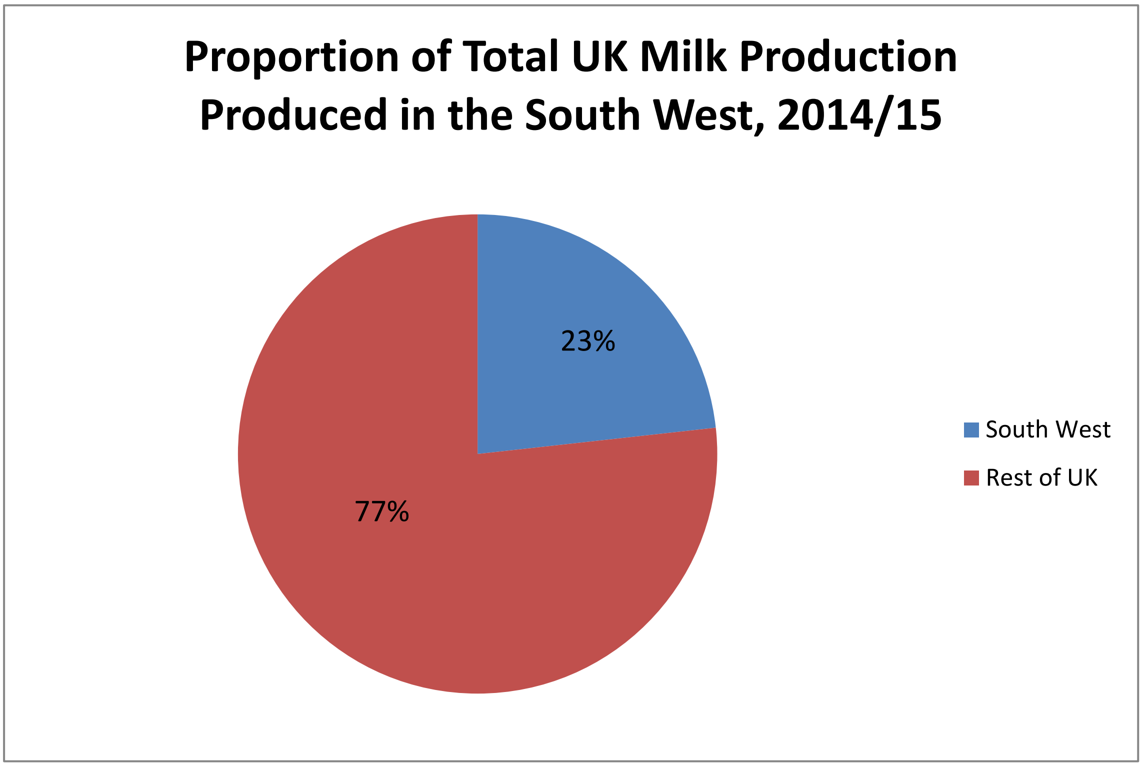

Figure 5: Proportion of UK milk production produced in the South West 2014/15. Source: Defra/RPA via AHDB Dairy.

Milk utilised for liquid

In the 2015/16 milk year, over 6.5bn litres (6,730,000,000 litres) of milk were utilised as liquid milk in the UK. With the South West home to 23.75% of the UK's adult dairy cows and producing 23.25% of the UK milk production, it would therefore indicate that approximately 1.5bn litres (1,581,550,000 litres) of the milk produced in the South West is utilised as liquid milk. With an average retail price for liquid milk of 44.9ppl (based on the retail average for 4 pints), the retail value of liquid milk produced in the South West is therefore likely to be in the region of **£710m per annum** (£710,115,950).

Cheese

In 2015, 422,000 tonnes of cheese were produced in the UK. Taking into account production figures from individual processors, some 160,500 tonnes of cheese are produced per annum in the South West of England. With an average retail price for cheese of £6.34 per kg, the retail value of cheese produced in the South West is therefore likely to be in the region of **£1.02bn per annum** (£1,017,570,000).

Company	Cheese produced annually (tonnes)
Alvis Brothers	6,000
Arla UK	37,000
Barber's	21,000
Dairy Crest	50,000
Parkham Farms	5,000
Wyke Farms	36,500
Local dairies	5,000
Total	**160,500**

Table 1: Actual cheese production figures of dairy processors in South West England

Butter

In the 2015/16 milk year, the UK produced 159,000 tonnes of butter. With the South West home to 23.75% of the UK's adult dairy cows and producing 23.25% of the UK milk production, it would therefore indicate that approximately 37,365 tonnes of butter are produced in the South West per annum. With an average retail price for butter of £5.31 per kg, the retail value of butter produced in the South West is therefore likely to be in the region of **£198m per annum** (£198,408,150).

THE SOUTH WEST PROCESSING SECTOR

Most milk in South West England is sold to a dairy processor, with the milk normally collected every two days from the farm. The principal milk processors operating in the region are Arla Foods, Dairy Crest and Müller, who between them account for some 75% of the milk sold from South West dairy farms. Their operations are outlined below, followed by examples of the smaller, mainly local, processors accounting for the remaining 25% of milk from the South West dairy sector.

Arla Foods UK - www.arlafoods.co.uk

Arla Foods is a dairy cooperative, owned by farmers. Originally founded in Sweden and Denmark to produce and provide the best dairy products, currently Arla is operating in seven countries in Europe and the UK. Arla Foods UK is an integrated dairy business, owned by 2,700 British dairy farmers with many based in the South West of England. With 16 sites across the UK, Arla processes 3 billion litres of milk a year and has 25% of the UK milk pool. This was enhanced by the opening of Arla Foods' new dairy in Aylesbury in 2013; this is the world's largest fresh milk facility with the capacity to process one billion litres of fresh milk per annum. The milk is delivered to its retail customers nationwide, but mainly in the south east. This plant takes the majority of the milk exported from South West England.

In addition early in 2016, Arla Foods took full ownership of Westbury Dairies, the country's largest skimmed milk powder and bulk butter production facility in Wiltshire. The plant plays a key role in providing the balancing capacity necessary for the British dairy industry to meet its annual peaks in production, particularly in support of the fresh liquid milk market.

The European cooperative also retains significant cheese processing capacity in SW England through its Taw Valley Creamery in Devon, including Cheddar, Red Leicester and Double Gloucester cheeses. Its smaller scale Trevarrian creamery in Cornwall produces soft cheeses.

Making 4,000 deliveries to stores and regional distribution centres each day**,** the UK is Arla's largest market, contributing 28% of the annual global turnover. The UK turnover in 2015 for Arla was £2.9 billion, being the UK's leading supplier of fresh milk and cream to the UK's major retailers, home to some of the most popular dairy brands including Lurpak, Anchor, Cravendale and Lactofree and the UK's largest cheese manufacturer. Arla is also a major supplier to McDonald's, Starbucks and ingredients customers. The business employs 4,000 people across the UK located at its dairies, distribution centres and head office.

Barber's - www.barbers.co.uk

Barber's is the oldest surviving cheddar-maker producing some 21,000 tonnes of cheese per annum from 100 local farms in addition to their own dairy farming enterprise.

Dairy Crest - www.dairycrest.co.uk

Dairy Crest has the largest cheese creamery in the UK, located in Cornwall and produces both Cathedral City and Davidstow brands of Cheddar. Milk is supplied directly from 400 dairy farmers in Devon and Cornwall, all within 80 miles of the Creamery. Davidstow Creamery processes over 500 million litres of raw milk per year and employs 195 staff and allows for constant production all year round, manufacturing over 50,000 tonnes of cheese per year.

With milk that comes exclusively from farms in Cornwall and Devon, the top selling Cheddar brand, Cathedral City, is one of the leading cheese brands in the UK. Cathedral City also is exported to Europe and many other parts of the world too. Dairy Crest also owns and manages some of the UK's most popular products including Clover and Country Life, with the latter being the only major butter brand to be made in the UK. Dairy Crest sold its dairies business to Muller in 2015, but has invested in innovation and technologies to build on their products such as demineralized whey for the infant formula and sports drinks markets.

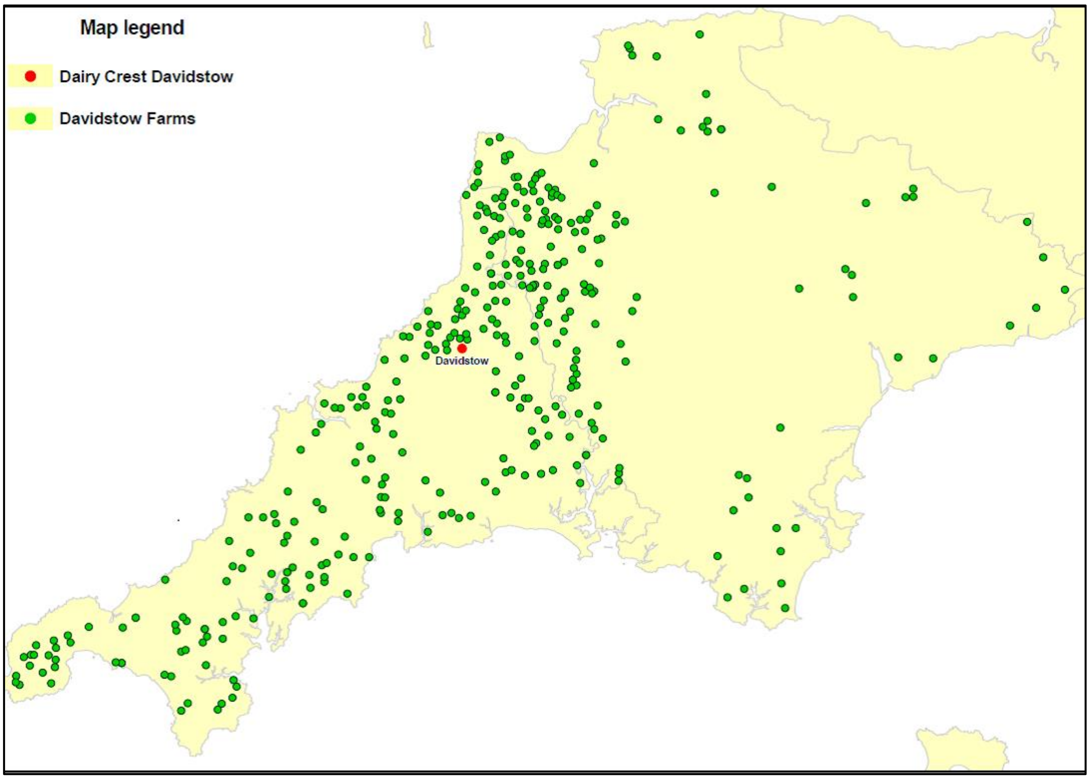

Figure 6: Map showing Davidstow Milk Pool 20th September 2016. Source: Dairy Crest

Müller – www.muller.co.uk

In 1971, Theobald Alfons Müller took over a small dairy with four employees in Bavaria in Germany. The Müller Group now employs more than 25,000 people with operations in more than 10 countries. It is the largest private dairy in Germany and has held the market leading position in the UK's yogurt segment since 1995. In 2012, Müller acquired Robert Wiseman Dairies, with its extensive distribution network and including its state-of-the art liquid milk plant at Bridgwater. Müller also commissioned Britain's largest butter facility in Shropshire in 2013. In 2015, it purchased Dairy Crest's fresh milk operations, involving some 660 milk producers in the SW region to become the UK's largest private milk buyer and therefore with a significant presence in the South West of England.

Alvis Brothers - www.lyecrossfarm.co.uk

Alvis Brothers Ltd owns, produces and manufactures the cheese brand Lye Cross Farm Cheese. The Alvis family have been making cheddar on the family farm since 1952 and it remains a family-owned farming and cheese production business, employing 142 staff.

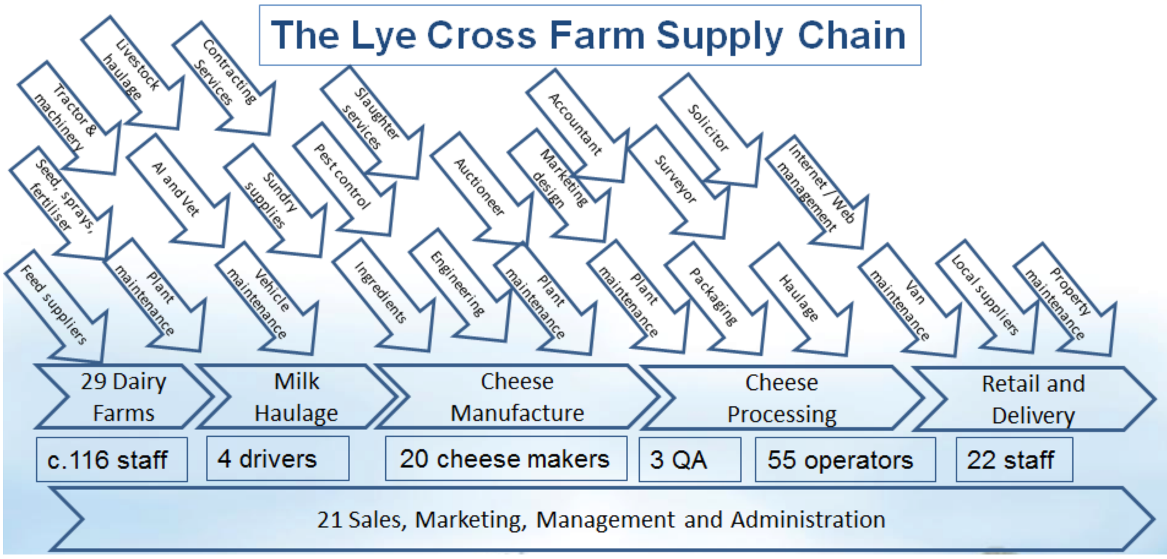

Figure 7: Lye Cross Farm supply chain.

Based in Somerset's Mendip Hills, Lye Cross Farm comprises of three holdings totalling 4,000 acres and comprising of 1,000 cows, 250 of which are organic. With their three family-owned farms and local farms in the surrounding area, 6,000 tonnes of cheese produced annually. Alvis Brothers' cheese is retailed in all major retail outlets, smaller retailers, local sales, farm shops, pubs, clubs, schools and National Trust and is exporting to 40 different countries. Lye Cross Farm also produces organic cheese made from organic milk produced from their own and local organic farms.

Blackmore Valley Dairy - www.bvdairy.co.uk

Blackmore Valley Dairy is a Dorset-based company producing dairy products for the manufacturing, food service and hospitality sectors. Products are made using 34 million litres of milk a year, supplied locally from farms within a 25 mile radius of the dairy located in Shaftesbury. Products include milk, also delivered door to door, soft cheese, yogurt, cultured cream and fresh creams.

Kelly's of Cornwall - www.kellysofcornwall.co.uk

Kelly's ice cream is made in Cornwall from Cornish milk supplied by Trewithen Dairies at Lostwithiel, Cornwall. During peak season, Trewithen supplies Kelly's with 17,000 litres of milk per day. The ice cream is made on site and sold via outlets across the county including 40 ice cream vans that can be located at picturesque locations during the summer months.

Lynher Dairies - www.lynherdairies.co.uk

Based in West Cornwall, Lynher Dairies are producers of artisan cheeses and are famous for the Cornish Yarg and Wild Garlic Yarg. 2.5 million litres of milk are sourced locally from Cornish dairy farms to produce 250 tonnes of cheese a year. This labour-intensive production makes Lynher Dairies a large employer in the rural area.

OMSCo - www.omsco.co.uk

The Organic Milk Suppliers Cooperative (OMSCo) is made up of over 200 farmer members across the UK producing over 250 million litres and 65% of the UK's organic milk supply. It is the only 100%

organic farmer-owned and farmer-run dairy cooperative in the UK. It is also the largest and longest established UK organic dairy cooperative with a turnover of £100 million. It is also the second largest dedicated organic milk pool in the world. OMSCo supplies the majority of the UK's organic dairy processing needs as well as having extensive experience of exporting raw milk, bulk ingredients and now consumer products to foreign markets including much of Europe and the USA. Exports currently represent 20% of sales, and it is forecast to increase to almost 30% in the next financial year. OMSCo's main products include bulk milk, powdered milk, cream, butter and cheese. All the milk used to make Kingdom Cheddar comes from a small number of family farms located in the South West region of England. The Kingdom brand is the only European organic cheese available in the USA; it is hugely popular and a brand that has potential to grow further.

Parkham Farms -- www.parkhamfarms.com

Parkham farms have been producing farmhouse cheddar since 1984 and with production of some 5,000 tonnes per annum is a significant processor in the region.

Premier Products – Ambrosia - www.premierfoods.co.uk/our-brands/ambrosia

Premier Products have 13 locations across the UK with Ambrosia based in Devon making dessert products including custard and rice puddings, all made from locally sourced milk. As a UK company, it employs a work force of 4,000 people with a trading profit of £131 million. Brands made by Premier Products are found in 95% of British households, but with only 5% of sales currently outside of the UK, the business is striving towards an 18% target over the next 12 months.

Quicke's - www.quickes.co.uk

Quicke's, based in Newton St Cyres, Devon is an artisan cheese manufacture producing a range of traditional cloth-bounded cheddar cheeses and butter. Milk is used from the family's own farm consisting of 1,500 acres and 500 dairy cows, farmed on a New Zealand system to ensure the grass flavours enrich the cheeses. Quicke's also produce butter and is retailed both locally and nationally and through their farm shop and by post. Quicke's employs a team of 17 people.

Rodda's - www.roddas.co.uk

Rodda's has been making Cornish clotted cream at Scorrier, near Redruth in Cornwall for over 120 years. As well as the famous clotted cream Rodda's also make custard, crème fraiche, butter, milk and pouring creams. Rodda's until recently had its milk supplied via Arla; however, it now has 151 local farmers, all within 30 miles of the creamery to supply them directly. This has allowed the creamery more control over the composition of the milk it receives, whilst offering farmers a 2ppl premium over current milk prices.

In 1998 Cornish clotted cream was awarded Protected Designation of Origin (PDO) status. From this date, for a product to be called 'Cornish clotted cream' it has to be made in Cornwall, to the traditional local method, using Cornish milk. This gives Cornwall and clotted cream producers and their dairy farmers a product with a unique selling point that will always be in demand. Rodda's produce 25 tonnes of clotted cream daily which is retailed locally, nationally and enjoyed all over the world, in countries as varied as Dubai, Germany, Holland, Italy, Japan, Madeira, Malaysia, Portugal, Singapore, Spain, Sweden, Tenerife and Hong Kong. Rodda's cream is on over 90% of airlines that fly out of Heathrow, introducing the Cornish clotted cream tea to travellers from all over the world.

Roskilly's – www.roskillys.co.uk

Roskilly's is based on the Lizard Peninsula in Cornwall. Ice cream is made from milk produced from the farm's 125 Jersey dairy herd. The diverse range of flavoured ice cream is sold all over the South West and in London with new flavours constantly in creation. Roskilly's is a family-run operation, but also employee 45 people, 42 of whom are resident in the village, ensuring local employment.

Trewithen Dairy – www.trewithendairy.co.uk

Trewithen Dairy is a family business which supplies local and national retailers, farm shops, schools, Great Western Rails and Kelly's of Cornwall Ice Cream to name a few. Products made by Trewithen include milk, cream, butter, yogurt, crème fraiche and buttermilk. Trewithen Dairy is Cornwall's third largest direct milk buyer and the largest bottler of milk in the county.

Based at Lostwithiel in Cornwall, Trewithen Dairy has 23 local dairy farms all within 25 miles of the dairy that supply 80% of milk required. The remaining 20% milk supply comes from the neighbouring county, Devon. 100,000 litres of milk per day is delivered by artic milk tankers, which collect an average of just over 6 farms each totalling, 9 million litres per annum on every other day collection. The company employs over 200 employees, and is therefore a good employer for the rural area as well as supporting the dairy industry.

Wyke Farms – www.wykefarms.com

Wyke Farms is based in Somerset and produces and manufactures cheddar cheese and butter. Based on a 150 year old recipe, Wyke Farms supply locally, nationally and internationally to 150 countries around the world. Wyke Farms source milk from 110 local farms and employ 200 local people, who package 100 tonnes of cheddar a day.

Yeo Valley - www.yeovalley.co.uk

Yeo Valley is based in Somerset, and was launched in 1992. It has a turnover of £300m, employs 1,500 people and is a privately owned family company. Yeo Valley owns 1,500 acres of farming land, including Blagdon Dairy, the production site for their yoghurts. In order to source sufficient milk for production, the company takes milk from 90 other organic farms, mostly in the south west. In excess of 2,000 tonnes of organic yoghurt, butter, ice cream and milk is produced each week.

IMPACT OF DAIRY FARMING

The impact of dairy farming on the wider economy of South West England was investigated through utilising information from the Farm Business Survey's dataset of 77 representative dairy farms in South West England (Rural Business School, 2016), together with a series of mini-case studies. These mini-case studies included two dairy farms (not from the FBS dataset) to analyse expenditure by category and to pinpoint the main destinations of this spend. This was augmented by further mini-case studies in the animal feed sector (a regional and a local company), two farm veterinary practices and a range of major and local dairy processors.

	Farm Business Survey	**Case study farm 1**	**Case study farm 2**
Number of farms	77	1	1
Cows per herd	156	240	225
Yield litres/cow	7,016	8,232	9,193
Output	**£/cow**		
Milk	2191	2,058	2,199
Calves	116	53	27
Other revenue	0	180	162
Costs			
Feed & fodder	585	907	787
Vet & med	71	63	75
Other livestock costs	157	177	120
Forage	116	50	200

Table 2: Dairy farm output and variable costs from Farm Business Survey data and case study farms

Animal feed

Animal feed is normally by far the largest dairy herd cost in most dairy farming systems and this was reflected in the current study (ranging from £585 to £907 per cow). South West England's dairy farmers spend **£333m per year with the animal feed sector**. The majority of this expenditure is with a regional cooperative (38%) or the major regional feed company (37%). The remainder is split between the smaller companies and national feed companies. Even the latter have feed mills within the area, so virtually all the expenditure on feed leads to employment within South West England (**502 jobs**).

Some of the main companies active in animal feed supply to dairy farms are:

Crediton Milling
Duffields
For Farmers
Harpers Feeds
Mole Valley Farmers
NWF Agricullture
Three Counties Feeds

Agricultural Contractors

Average expenditure on agricultural contractors, largely involved in silage-making and slurry spreading, is a significant cost (£142 to £134/cow), representing a total spend of **£73m**. All of these are local small businesses, many of which are dedicated to the dairy sector. The work has significant seasonal peaks, so that a significant part of the labour used is on a casual basis. Through interviews with such contractors, it has been possible to estimate that there are the equivalent of **215 jobs** dependent on the South West dairy farming

Farm veterinary services

Average expenditure on veterinary services and medicine ranges from £15.2k to £16.8 per herd or £63 to £71 per cow. Some 90% of this is spent with local farm veterinary practices. This represents a total spend of **£29.4m per year** and an estimated **360** jobs across the 80 farm veterinary practices in the South West of England.

Labour

South West dairy farms' expenditure on labour ranges from £129 - £135 per cow per annum. This represents a total spend of **£118.2m** per year for the sector as a whole. Estimates of the total jobs in dairy farming have been made to include farmers, managers and staff. The increase in contracting of self-employed staff as herd managers and herdspersons on dairy farms can confuse the issue, as these staff are then classed as contractors in the accounts. For the purposes of this study, however, the jobs include all farmers and staff based on the farm holding, regardless of employment status. Total **jobs on dairy farms across the south west are 8,139.**

Machinery and equipment

Average expenditure of some £100 per cow per annum on machinery and equipment maintenance and repairs was found in the case studies and confirmed from the FBS dataset. This is again largely carried out by local firms, normally providing a routine as well as an emergency service to farms. Total expenditure is **£48.7m**, involving some **109 jobs** across the sector.

Other professional services

The average spend on professional services such as farm business advisers and accountants is £50/cow, representing a total spend by the sector of **£20.8m** per annum. Whether local or national firms, the advisers tend to be based in the region, with an estimated **195 jobs** involved.

Financial services

The average spend on financial services including mortgages, hire purchase, loans and bank overdrafts amounts to some **£31.7m** per year.

Other costs

Other significant costs would be **fertiliser (£21.2m** per annum**)**.

Overall Impact

From the previous section, the value of milk produced at the farmgate was **£0.77bn per annum** and after being processed is worth some **£2.27bn** in terms of butter, cheese, milk and other products. Additional output in terms of calf and cattle sales represents some **£0.20bn.** Dairy farm expenditure contributes **£1.04bn** and so in total South West dairy farming's contribution to the regional economy is estimated to be **£3.51bn.** Other studies have suggested that this multiplier effect for agricultural production on the wider economy is in the region of 1.5 to 5, which would seem to corroborate the current estimates.

In terms of jobs, the 8,139 involved in dairy farming are matched by some 4,699 in the dairy processing industry and an estimated 1,077 in the ancillary industries arising from dairy farming expenditure (**5,776 total jobs**).

APPENDIX 1

Mini-case study farm 1: 240-cow dairy herd

Costs	Total £ per year	£ per cow per year	Suppliers used
AI	7,860	33	Genus, Semex
Vet & med	15,209	63	Castle Vets, Maunders, Mole Valley Farmers, CFL
Feed	214,932	896	Mole Valley Farmers, Pethicks, Tithebarn
Purchased forage	2,765	12	N Burden
Dairy sundries	13, 040	54	Abbeydale, Allflex, Davey, Peakes, CFL,, Maunders, AP Wilton, Genus, Bradstock
Dairy chemicals	2,563	11	Mole Valley Farmers, Genus
Fertiliser	12,047	50	Mole Valley Farmers
Forage other	0	0	
Bedding	19,109	80	Berry's Ag, Plymouth Industries & Wharfage
Commissions/levies	7,890	33	CIS, Dawn Meats, Jaspers, Dairy Crest, St Merryn
Contractors	80,137	334	R Davey, M Pethick, M Hicks, B & B, M Connell.
Equipment repairs	2,656	11	MVF, Venture, Maunders, Hart, Craddock
Machinery repairs	27,363	114	Hambly, Smallridge, Beares, Truro Tractors, Cornish Tractors, Geoffrey Harris
Farm repairs	19,202	80	M Connell, R. Horne, MVF, Cormac
Fuel & utilities	15,305	64	Mitchell & Webber, Keltic, MVF
Labour	32,356	135	
Professional	900	4	Sum-it
Finance & insurance	8,548	36	National
Miscellaneous	3,000	13	Biffa Waste, Greenaway Recycling
Rent	125,087	521	Duchy of Cornwall
Total costs	**609,969**	**2.542**	
Income			
Milk	493,945	2,058	Dairy Crest
Calf	12,828	53	
Cattle	2,352	10	
Cull	30,598	127	
Miscellaneous	12,651	53	
SPS	48,837	203	
Total income	**601,211**	**2,505**	

Jobs: 6.00 FTE

APPENDIX 2

Mini-case study farm 2: 225-cow dairy herd

Costs	Total £ per year	£ per cow per year	Suppliers used
AI	11,224	50	Genus
Vet & med	16,804	75	Kernow Vets
Feed	177,079	787	Mole Valley Farmers via buying group
Purchased forage	0	0	
Dairy sundries	15,928	71	Mole valley Farmers
Dairy chemicals	3,136	14	Mole Valley Farmers
Fertiliser	16,087	72	Mole Valley farmers via buying group
Forage other	29,003	129	Mole Valley farmers, Agrii
Bedding	7,969	35	Wills
Commissions/ levies	3,928	17	
Contractors	32,120	143	Pridhams
Equipment repairs	5,078	23	AF Maintenance
Machinery repairs	11,624	52	Beares, Smallridge, Geoffrey Harris, Lutey
Farm repairs	12,249	54	Pridhams
Fuel & utilities	22,723	101	Via buying group - various
Labour	62,839	279	
Professional	11,068	49	FCCG, Old Mill
Finance & insurance	29,633	132	Nat West, NFU
Misc	2,809	12	
Rent	61,420	273	Prideaux- Brune Estate
Total costs	**532,771**	**2,368**	
Income			
Milk	494,764	2,199	
Calf	6,060	27	
Cattle	0	0	
Cull	36,408	162	
Miscellaneous	0	0	
SPS	20,000	89	
Total income	**557,232**	**2,477**	

Jobs: 3.75 FTE

APPENDIX 3: Supplier mini-case studies

1. Major regional feed Supply Company.
    - 50% of operations depend on the dairy sector
    - 36% of the dairy feed market
    - 77 jobs including haulier.

2. Local feed supply company
    - 95% of operations depend on the dairy sector
    - 23 jobs

3. Farm veterinary practice (NE Devon)
    - 75% of operations with dairy sector
    - 20 jobs

4. Farm veterinary practice (W Cornwall)
    - 82% of work with dairy sector
    - 10 jobs