

ABSTRACT

Farmers' direct sales in South Tyrol

Farm direct marketing contributes to securing farmers' incomes and ensures a diverse regional food supply. As important ambassadors of agricultural products, direct marketers create trust through transparency and direct contact with customers. Five years after the first survey, the Institute for Economic Research (IER) of the Chamber of commerce of Bolzano/Bozen presents an updated analysis of farm direct marketing in South Tyrol. The aim is to highlight not only structural data and developments but also current challenges. A total of 268 direct marketers participated in the online survey conducted in summer 2025.

Farm direct marketing has become an integral part of agriculture in South Tyrol. The current survey shows that the number of direct marketers increased by 34% between 2019 and 2024, from 455 to 610. More than 70 % of the farms are located above 600 m a.s.l., which means that direct marketing also indirectly strengthens mountain farming. 77 % of the enterprises are full-time farms, but direct marketing also represents an important source of income for part-time farmers. The share of organic farms is above the agricultural average and has continued to rise, reaching 28 %.

Turnover from direct marketing grew from EUR 44.7 million in 2019 to EUR 61.1 million in 2024 (+36.6 %). The average revenue per farm remained stable at around EUR 100,000, though there is considerable variation between small and large farms. 45 % of the enterprises generate less than EUR 50,000, while 30 % exceed EUR 100,000 in sales.

In terms of product groups, strong growth can be observed particularly for fresh fruit and vegetables (+132% farms) and for meat and meat products

(+64 % farms). The number of producers of wine and other alcoholic beverages has also increased, whereas a decline has been recorded for other animal products. Overall, three-quarters of total turnover comes from plant-based products (almost EUR 30 million from wine alone), and one-quarter from animal products.

Sales channels have become increasingly diversified. About one-third of the total turnover comes from direct sales to final consumers (EUR 15.3 million farm-gate sales, EUR 3.8 million farmers' markets). Two-thirds are generated through business-to-business sales: turnover via intermediaries (+43 %) and gastronomy (+36 %) has grown markedly. Demand is largely driven by locals, underlining the importance of direct marketing for the regional economy and for local food security. Tourists play a relevant role particularly for storable products such as wine and cheese: around 40 % of farm-gate and market sales are made to visitors.

The main challenges remain largely unchanged. Half of the enterprises consider the workload and legal requirements very demanding, while one-third cite marketing and investment costs as major obstacles. Despite these burdens, most producers are optimistic about the future. More than half plan to expand their activity – mainly through higher production volumes, but also by broadening their product range. Particularly high potential is seen for fruit and vegetables, meat products, and wine.

To fully exploit the untapped potential – especially in connection with tourism – stronger cooperation with gastronomy, joint initiatives, and closer collaboration along the entire value chain are essential. Consistent quality and branding strategies are also crucial for maintaining long-term competitiveness.