AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

No. 3/2026



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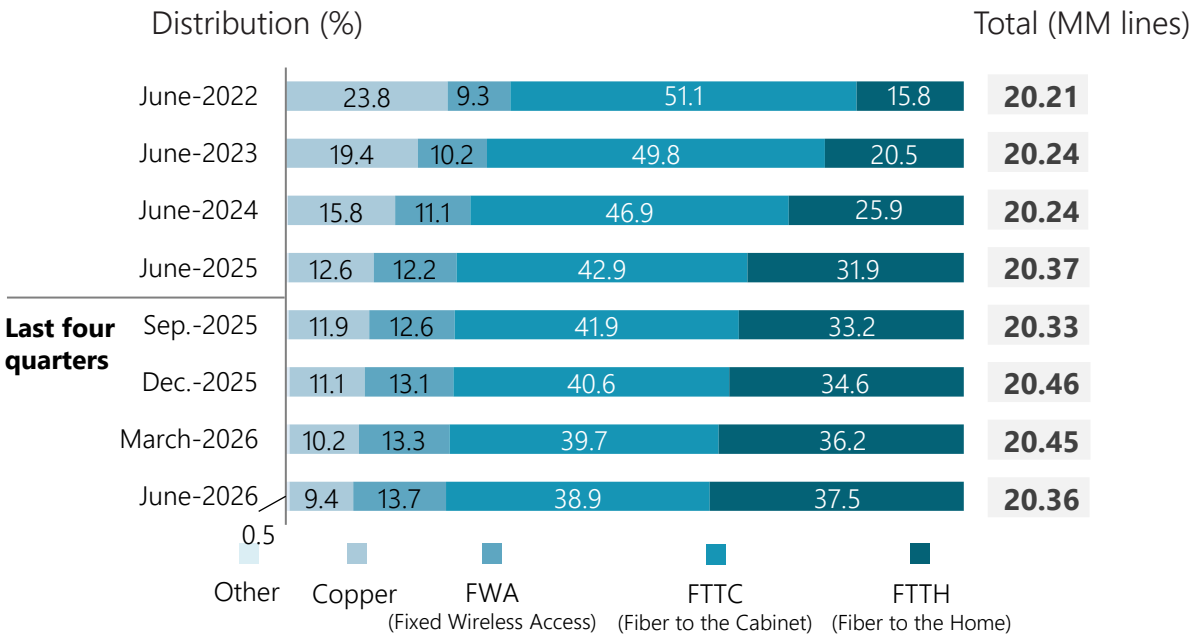
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The **Communication Markets Monitoring System** is a quarterly pubblication edited by AGCOM.

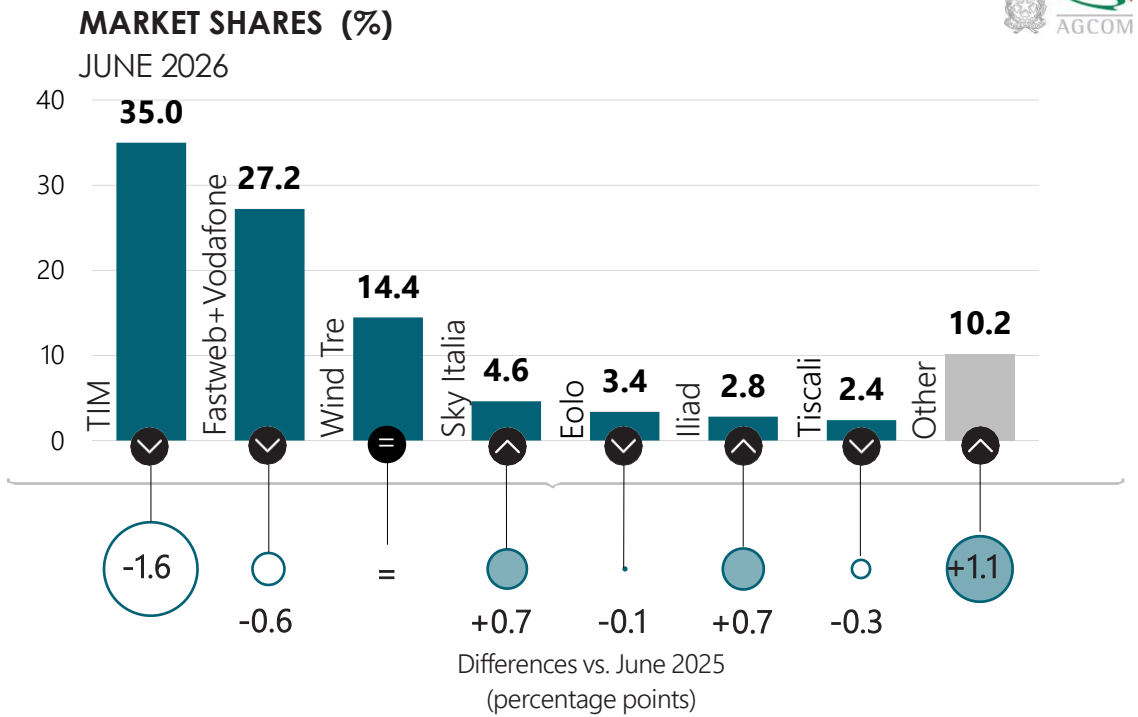
The values indicated in sections 1 and 3 are based on information provided by the main companies present in the electronic communications and mail and parcel delivery services markets. Regarding the section dedicated to media and internet platforms (section 2), the data refer to elaborations on information from external sources (Auditel, ADS, Audiweb and Comscore). In section 4, dedicated to the trend of national and international price indices of the markets for which the Authority is responsible, the data are provided by Istat, for the former, and from the Eurostat database for the latter.

The data collected for this edition are updated to June 2026. The percentage compositions are automatically rounded to the first decimal place. Due to changes in firms' accounting methods, some figures cannot be compared directly with those reported in previous issues.

1.1 FIXED NETWORK: TOTAL LINES



*Total lines includes Full ULL, SLU, Vula, DSL Naked, WLR, Bitstream NGA, Fibre and FWA. In line with European reporting, also includes lines in the "other NGA", "other not NGA" and "Satellite" categories (included in Other). As of June 2025, satellite lines are estimated at 67,000, "other not NGA" lines at just under 180,000 and the remainder (just over 8,000 lines) in the "othe NGA" category.



Total lines	(no. of lines)	(Δ %)
Quarterly change (Mar. 2026 – Jun. 2026)	**-90 k** lines	-0.4
Annual change (Jun. 2025 – Jun. 2026)	**-9 k** lines	-0.04

k = thousand

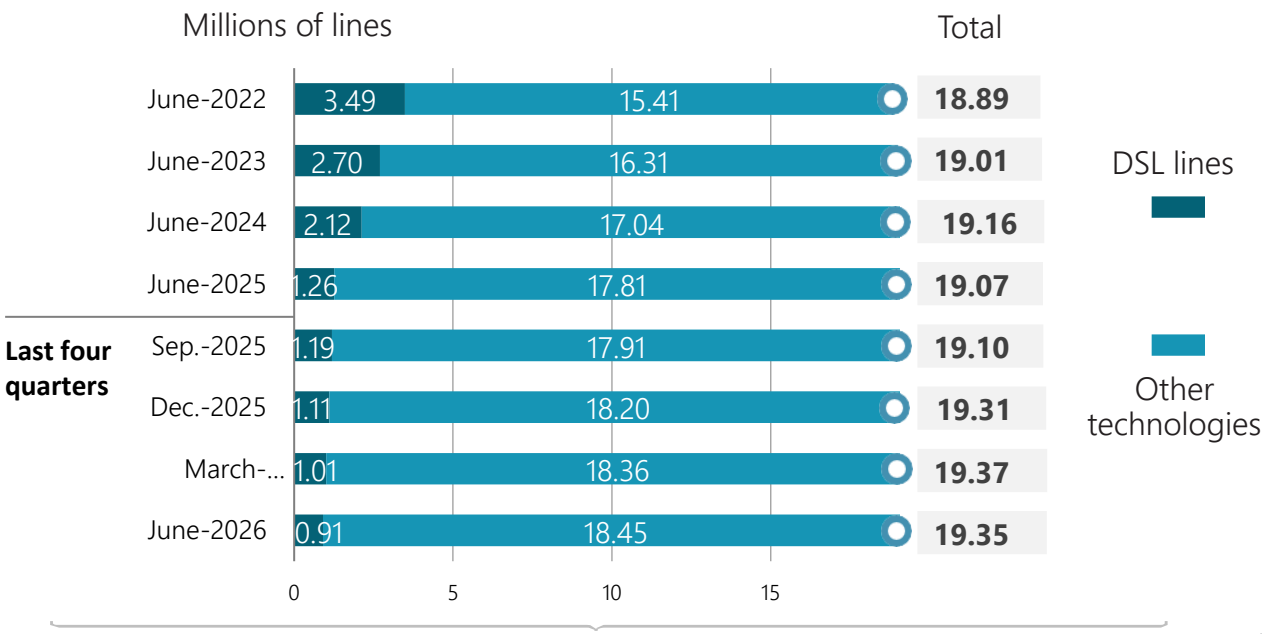
Distribution *(Δ 2025-2026) percentage points*	
Copper:	-3.2
FWA:	+1.5
FTTC:	-4.0
FTTH:	+5.6

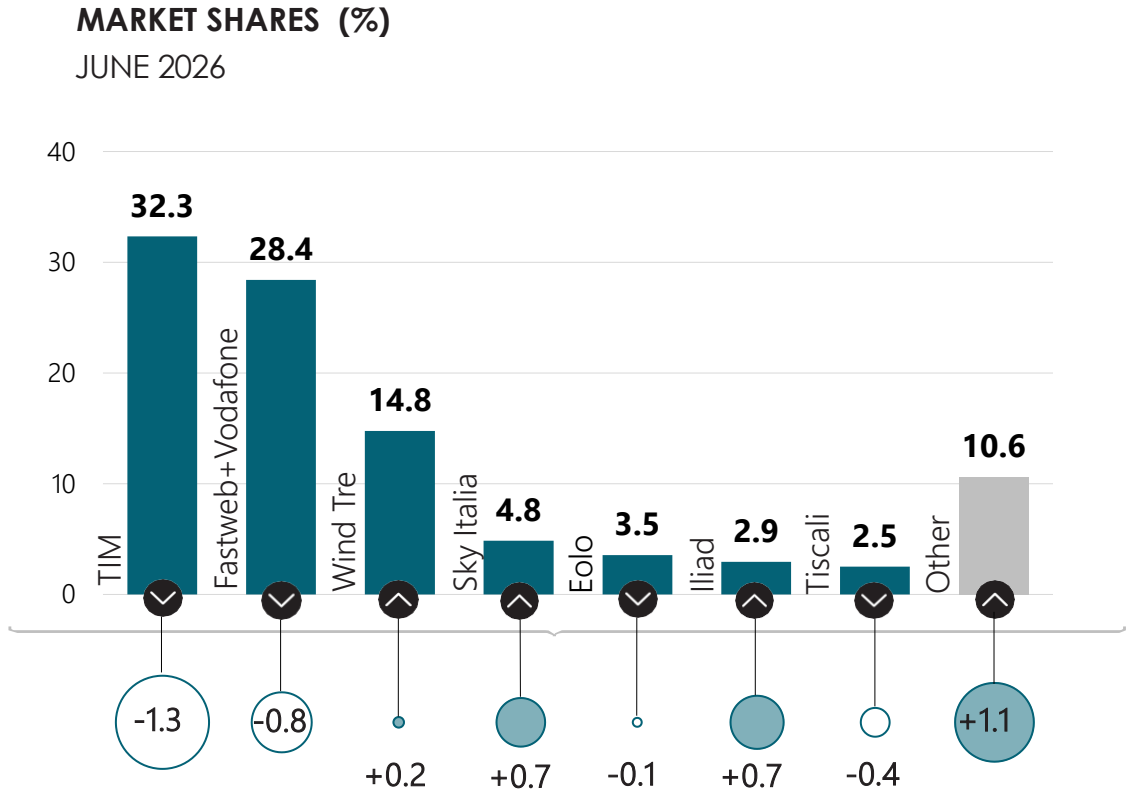
Data provided by: APS Senza Fili SEnza Confini, Aruba, BBBell, BT Italia, Colt Technology Services, Compagnia Italia Mobile, Coop Italia (CoopVoce), Convergenze, Daily Telecom Mobile, DIGI Italy, Dimensione, Enel Energia (Enel Fibra), Eolo, Fastalp, Fastweb+Vodafone, Fibercop, Fidoka, Go Internet, Green TLC, Hal Service, Iccom, Iliad, Informatica System, Infranet, Intred, Lycamobile, CittàStudi S.p.A. (MegaWeb), Micso, Mordacchini S.r.l., NewTec, Open Fiber, Planetel, PostePay, P.S.A. S.r.l. (Bandablu), Retelit RDS, Retelit-X, Sky Italia, Stadtwerke ASM, Stel, TecnoAdsl, Tesselis (Tiscali), TIM, Unidata, Vianova,, Wind Tre.

The data presented in the Electronic communications section also include an estimate of 'other companies' in the market.

As a result of reclassifications carried out by companies and methodological refinements in the calculation of fixed-line networks, historical data may differ and are not comparable with previous editions; it is therefore recommended to use this version of the Observatory to ensure access to the most up-to-date data.

1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES





Quarterly change
(Mar. 2025 – Jun. 2026)

Total lines

-17 k lines (-0.1%)

Annual change
(Jun. 2025 – Jun. 2026)

Total lines

+286 k lines (+1.5 %)

DSL lines

-351 k lines (-27.9%)

Other technologies

+638 k lines (+3.6%)

k = thousuand

1.4 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES BY TECHNOLOGY AND OPERATORS

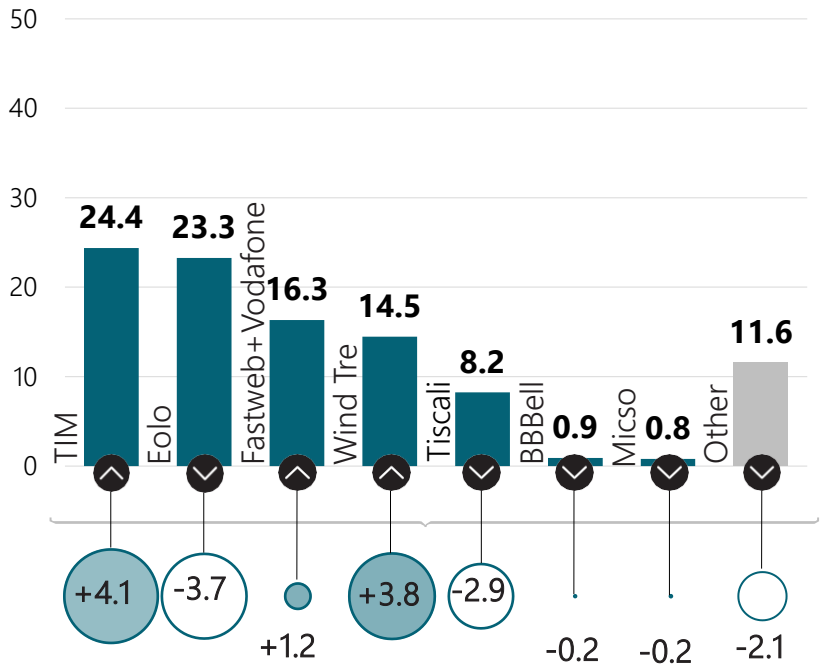
JUNE 2026

FWA

Total lines: **2.78** million access

Annual change
(Jun. 2025 – Jun. 2026)

+12.0%

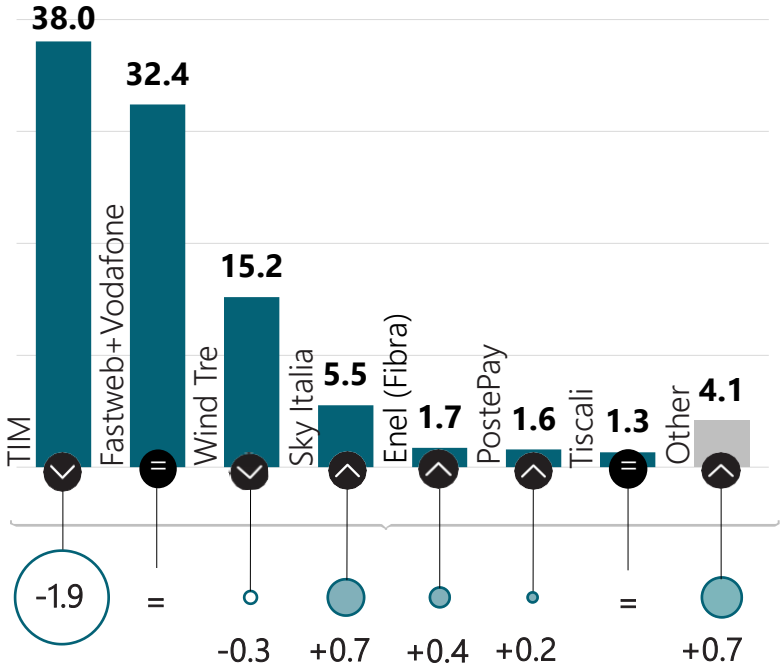


FTTC

Total lines: **7.92** million access

Annual change
(Jun. 2025 – Jun. 2026)

-9.5

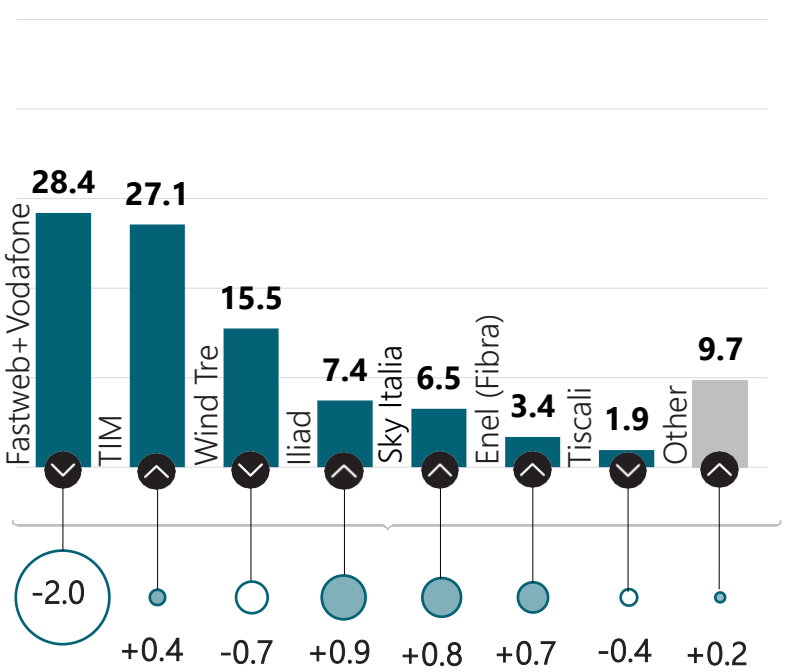


FTTH

Total lines: **7.64** million access

Annual change
(Jun. 2025 – Jun. 2026)

+17.5%



Differences vs. June 2025
(percentage points)

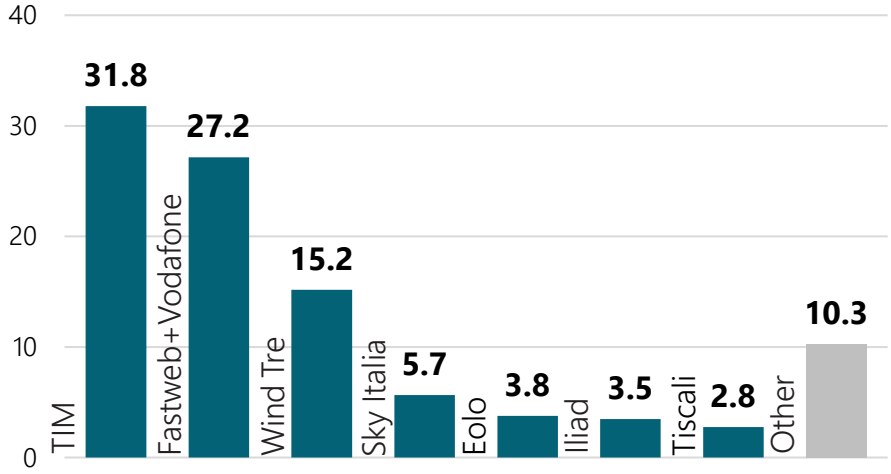
Note: elaborations based on data provided by companies for European reporting: DLS lines and the categories Satellite, "Other non-NGA" and "Other NGA" are excluded from the analysis..

1.4 FIXED LINES: BROADBAND LINES BY TYPE OF CUSTOMER AND OPERATORS

JUNE 2026

RESIDENTIAL CUSTOMERS

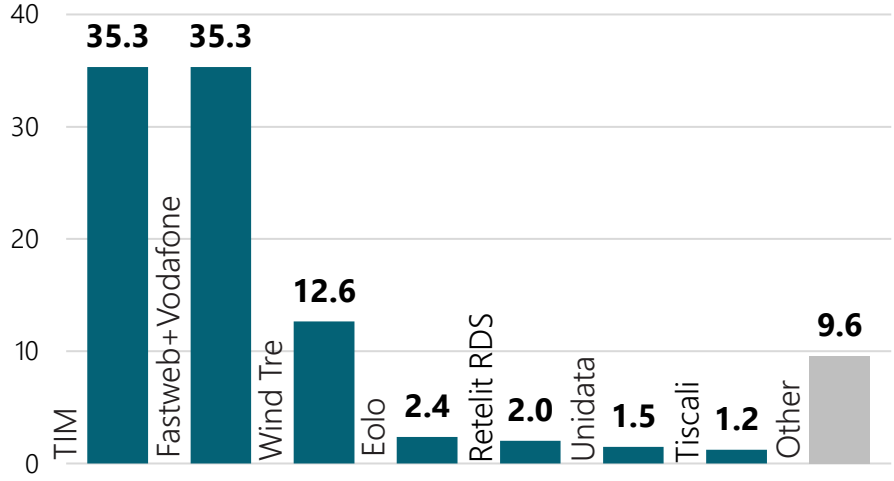
Total lines: **16.361** million lines

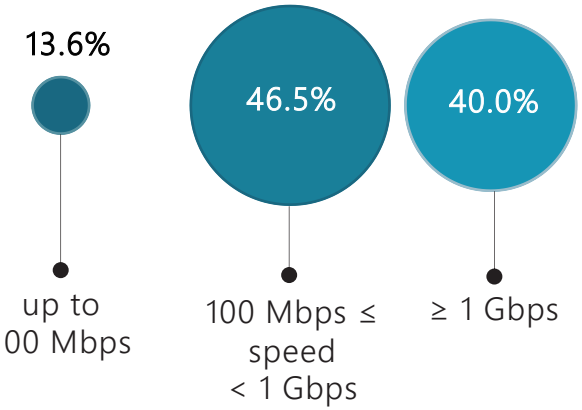


by operator (%)

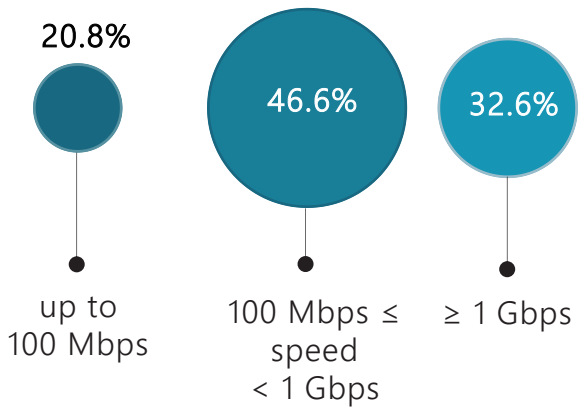
BUSINESS CUSTOMERS

Total lines: **2.992** million lines



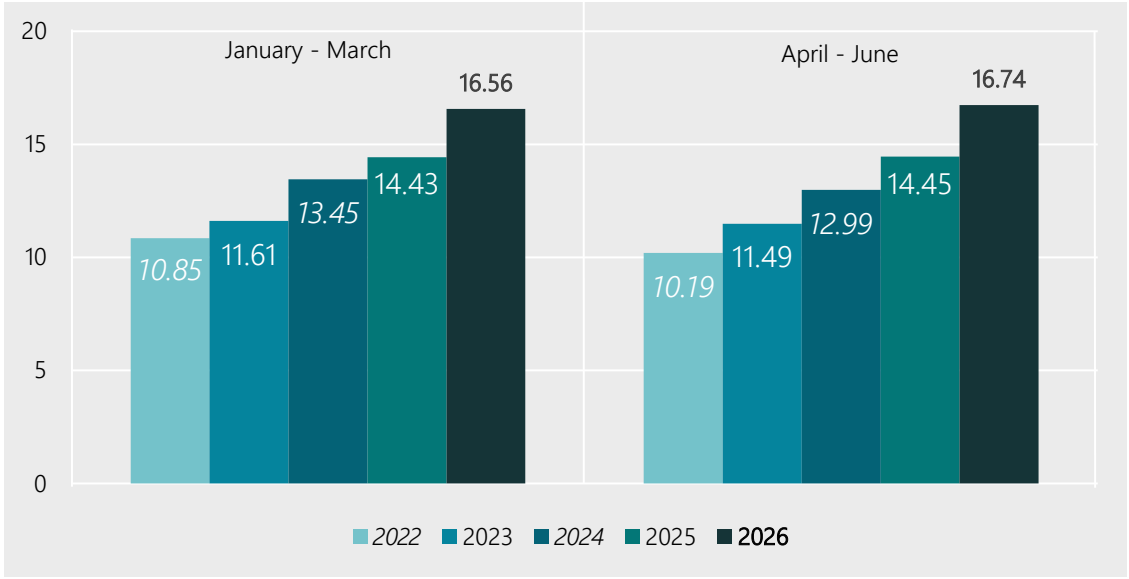


by marketed speed classes (%)

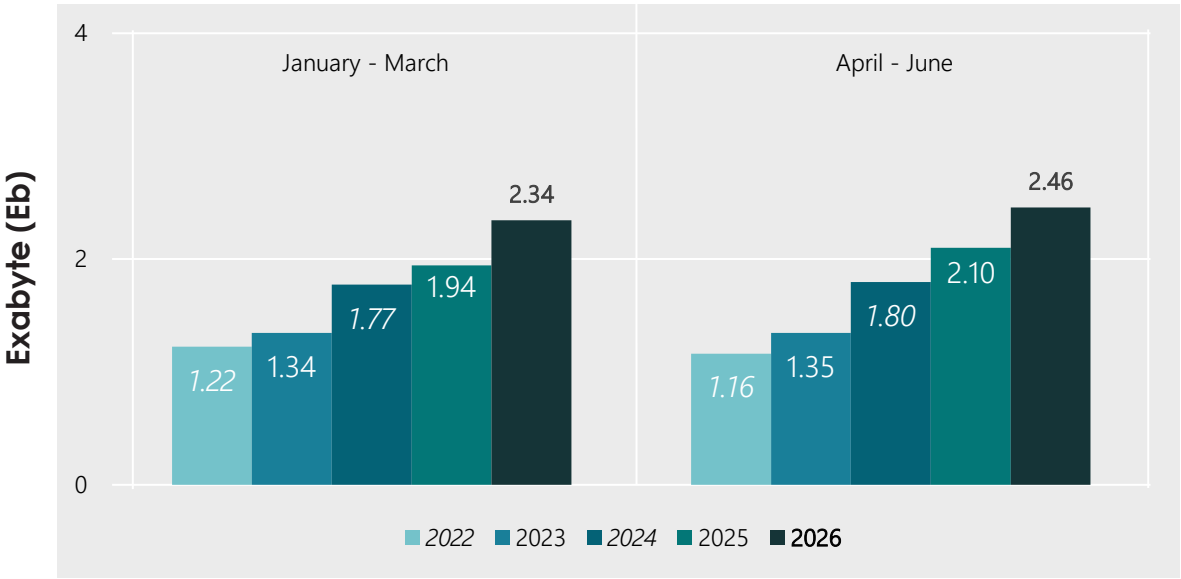


1.5 FIXED NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD

DOWNLOAD (cumulative monthly data)



UPLOAD (cumulative monthly data)



1 **Cumulative data since the beginning of the year** (Jan. – Jun.)

Exabyte	(2022)		(2023)		(2024)		(2025)		(2026)
	21.04	**+9.8%**	23.10	**+14.4%**	26.44	**+9.2%**	28.88	**+15.3%**	33.30
								+58.3%	

2 **Monthly comparision (change %)**

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+3.2	+13.0	+9.2	+16.4	+48.2
February	+9.4	+18.3	+6.1	+13.6	+56.0
March	+9.1	+16.4	+6.6	+14.1	+54.4
Avril	+9.8	+14.7	+10.9	+13.2	+58.0
May	+13.7	+11.5	+11.3	+16.8	+64.6
June	+14.9	+13.1	+11.6	+17.6	+70.5

1 **Cumulative data since the beginning of the year** (Jan. – Jun.)

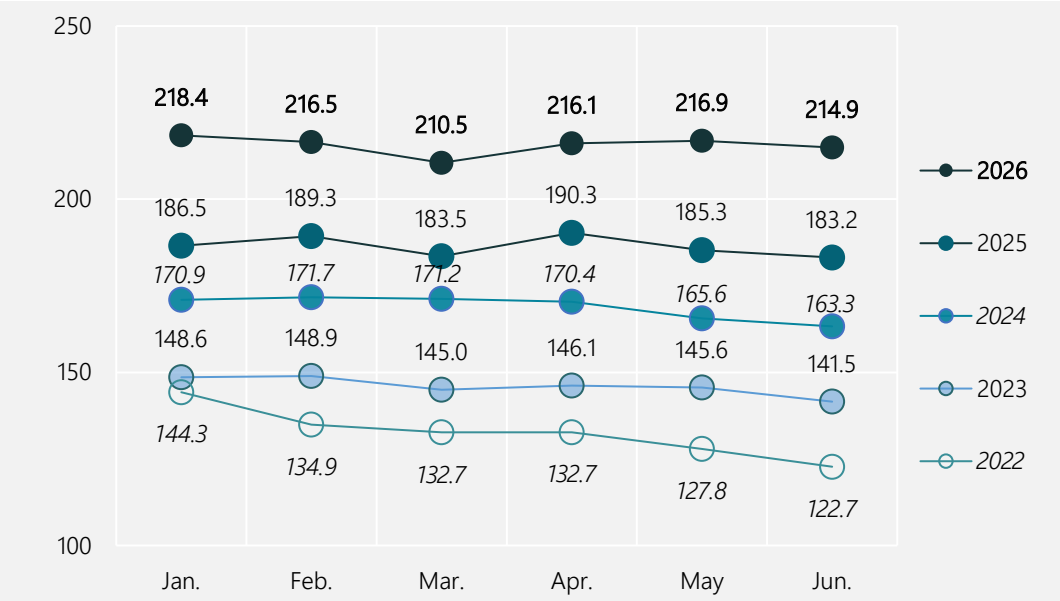
Exabyte	(2022)		(2023)		(2024)		(2025)		(2026)
	2.38	**+12.8%**	2.69	**+32.7%**	3.57	**+13.3%**	4.04	**+18.7%**	4.80
								+101.3%	

2 **Monthly comparision (change %)**

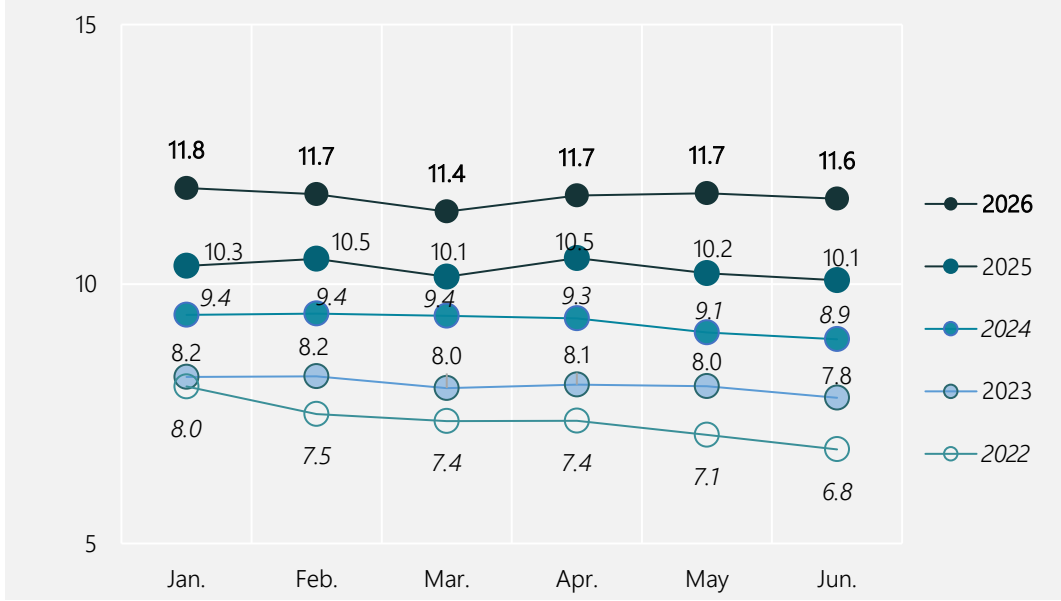
	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+1.6	+33.5	+8.7	+22.2	+80.4
February	+19.1	+28.6	+9.1	+19.9	+100.4
March	+10.9	+33.1	+11.3	+19.4	+96.1
Avril	+13.2	+33.4	+17.6	+16.2	+106.5
May	+15.8	+32.8	+16.3	+19.3	+113.4
June	+18.5	+34.4	+16.4	+15.7	+114.5

1.6 FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

TOTAL TRAFFIC



PER BROADBAND LINE



1 Average daily comparison since the beginning of the year (Jan. – Jun.)

	(2022)		(2023)		(2024)		(2025)		(2026)
Petabyte	132.5	+10.1%	145.9	+15.7%	168.8	+10.3%	186.3	+15.7%	215.5
								+62.6%	

2 Monthly daily average comparision (change %)

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+3.0	+15.0	+9.1	+17.1	+51.4
February	+10.4	+15.3	+10.3	+14.3	+60.4
March	+9.3	+18.1	+7.2	+14.7	+58.7
Avril	+10.1	+16.6	+11.7	+13.6	+62.9
May	+13.9	+13.7	+11.9	+17.1	+69.7
June	+15.3	+15.4	+12.2	+17.3	+75.1

1 Average daily comparison since the beginning of the year* (Jan. – Jun.)

	(2022)		(2023)		(2024)		(2025)		(2026)
Gigabyte	7.36	+9.4	8.05	+15.0%	9.26	+11.1%	10.29	+13.5%	11.68
								+58.7%	

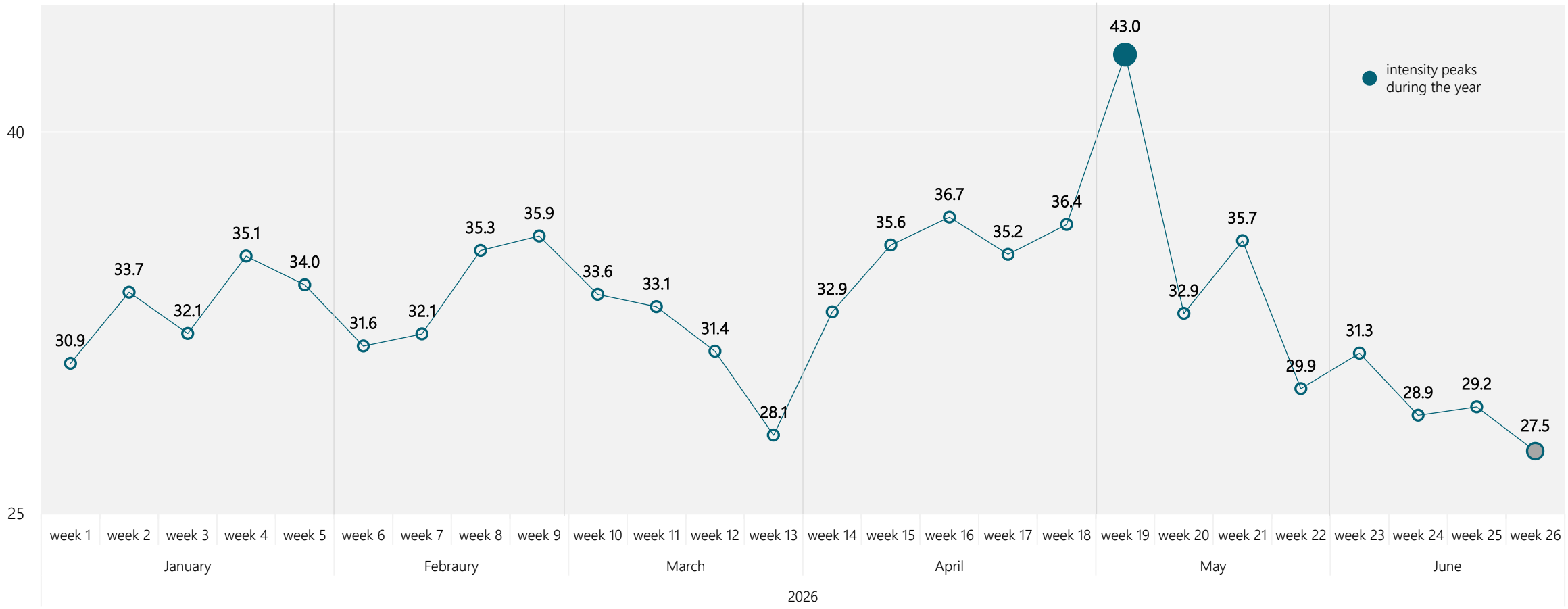
2 Monthly daily average comparision (change %)

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+2.3	+14.6	+10.0	+14.5	+47.6
February	+9.7	+14.7	+11.2	+11.9	+56.5
March	+8.6	+17.4	+8.0	+12.4	+54.8
Avril	+9.5	+15.9	+12.4	+11.5	+59.0
May	+13.2	+12.9	+12.6	+15.1	+65.6
June	+14.6	+14.4	+12.7	+15.6	+70.9

*The average daily value from the beginning of the year is calculated based on the average number of broadband and ultra-broadband lines during the reference period

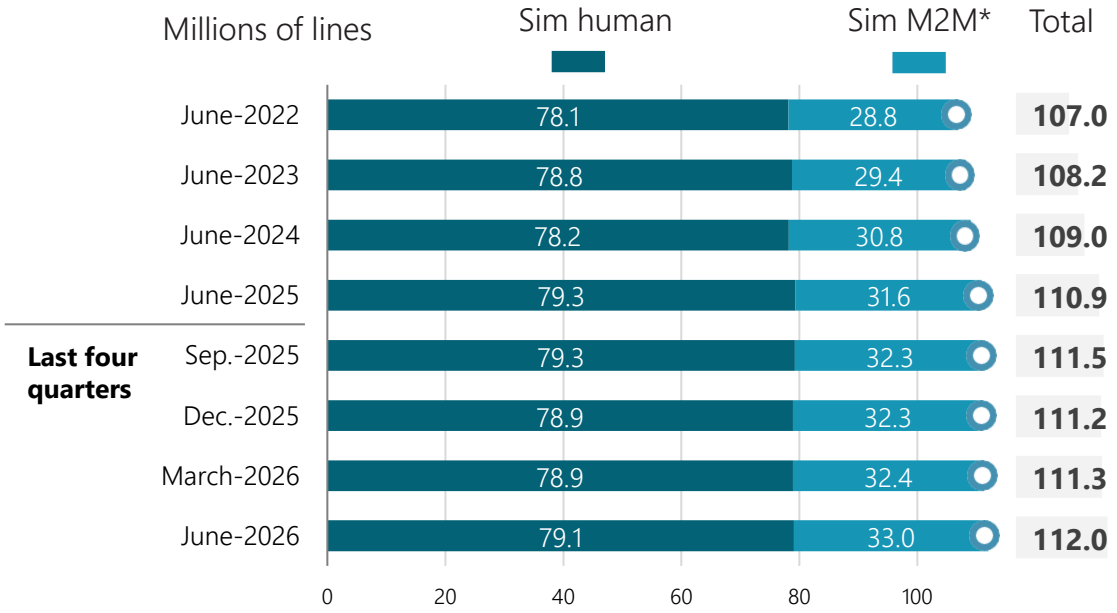
1.7 FIXED NETWORK: WEEKLY DATA TRAFFIC INTENSITY

Data traffic intensity in Tbps (Terabit per second)



Note: starting from January 2026, a change was made to the methodology used for monitoring traffic intensity by collecting the weekly peak, in Tbps, of inbound data traffic volume into the operator's network, measured over a time interval ranging between 5 and 60 minutes.
The figure shows the sum of the peak recorded by each operator during the week, which serves as an indicator of the overall intensity managed on fixed networks during that week.
In some cases, the week overlaps two months..

1.8 MOBILE NETWORK: TOTAL SUBSCRIBERS



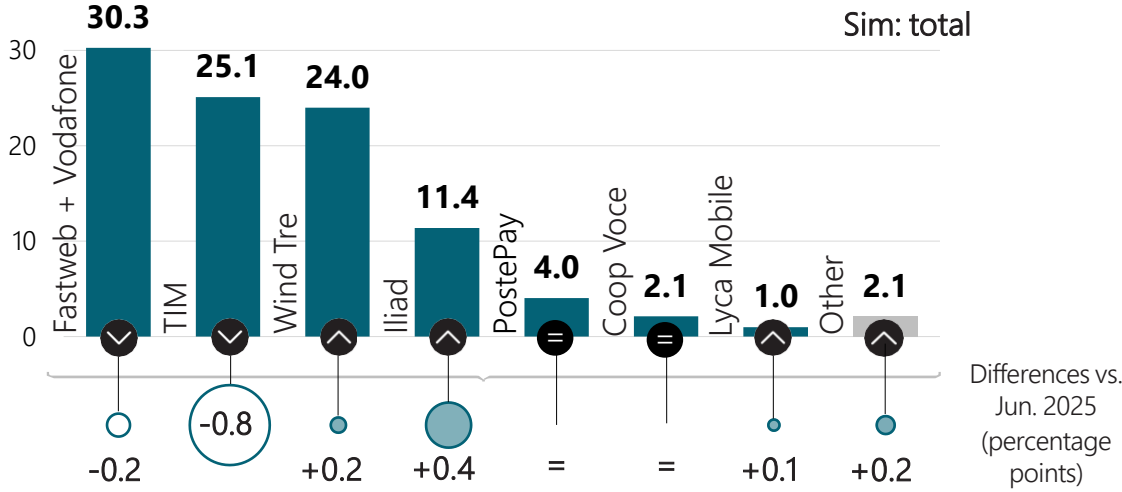
(*) Note: Machine-to-Machine sims are based on the technologies that enable devices and sensors or "things" (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

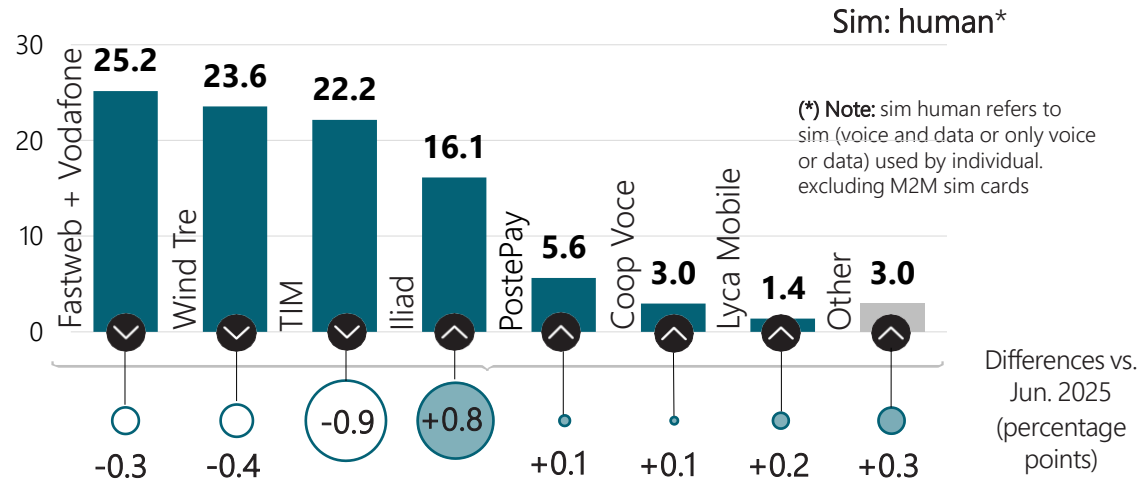
	Quarterly change (Mar. 2026 – Jun. 2026)			Annual change (Jun. 2025 – Jun. 2026)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
Total sim cards:	+718	↑	+0.6	+1,112	↑	+1,0
Sim human:	+179	↑	+0.2	-276	↓	-0.3
Sim M2M:	+539	↑	+1.7	+1,387	↑	+4.4

Note: the data for the operators TIM and Fastweb+Vodafone include the lines of their respective subsidiaries, namely Kena Mobile and VEI (which provides mobile telephony services under the name ho.).

MARKET SHARES (%)

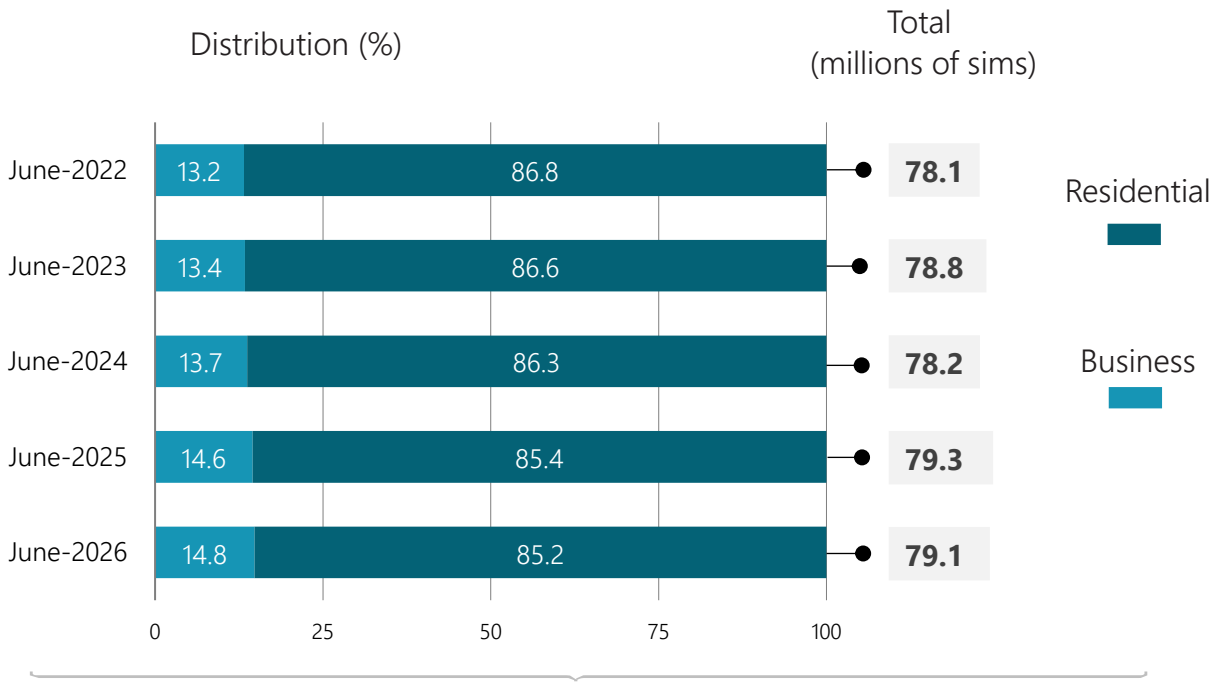
JUNE 2026





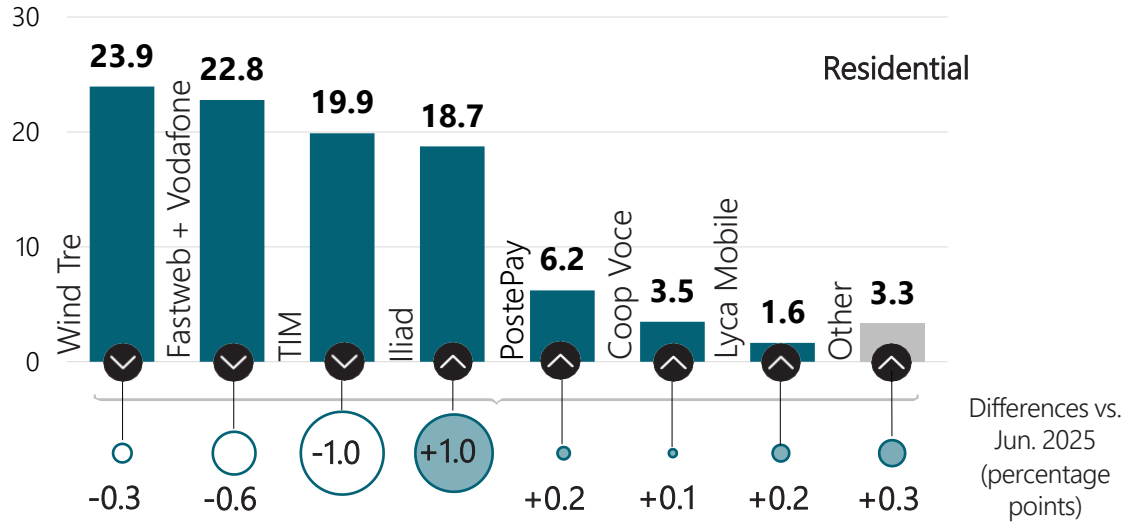
(*) Note: sim human refers to sim (voice and data or only voice or data) used by individual. excluding M2M sim cards

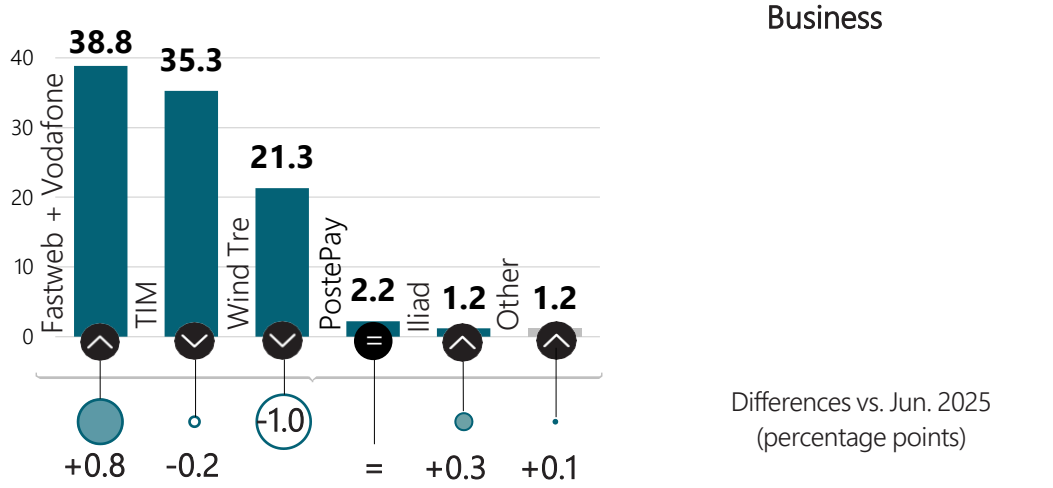
1.9 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



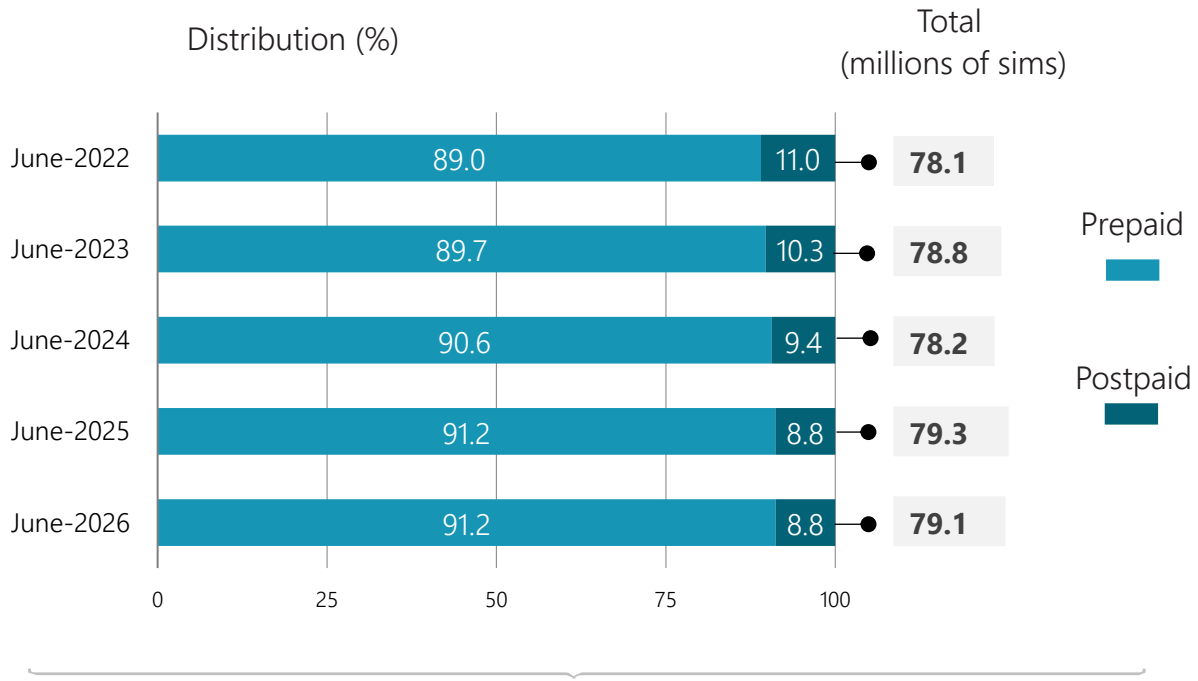
	Annual change (Jun. 2025 – Jun. 2026)			4-Year change (Jun. 2022 – Jun. 2026)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
Total human sim cards:	-276	↓	-0.3	+921	↑	+1.2
Residential sim card:	-457	↓	-0.7	-471	↓	-0.7
Business sim cards:	+181	↑	+1.6	+1,392	↑	+13.5

MARKET SHARES (%)
JUNE 2026





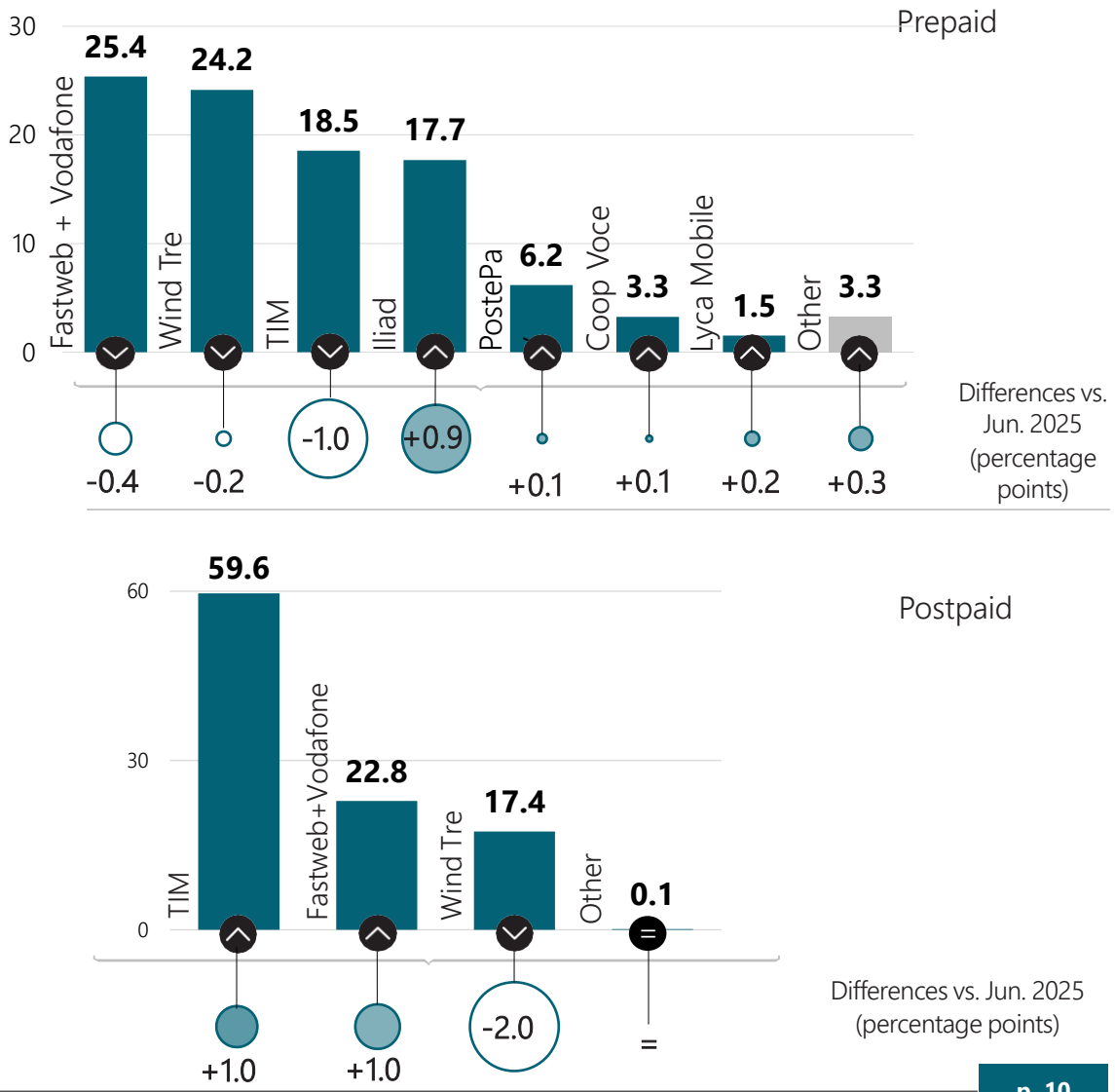
1.10 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT



	Annual change (Jun. 2025 – Jun. 2026) (no of sim in thousand)	(Δ %)	4-Year change (Jun. 2022 – Jun. 2026) (no of sim in thousand)	(Δ %)
Total human sim cards:	-276	-0.3	+921	+1.2
Prepaid sim cards:	-226	-0.3	+2,531	+3.6
Postpaid sim cards:	-50	-0.7	-1,610	+13.5

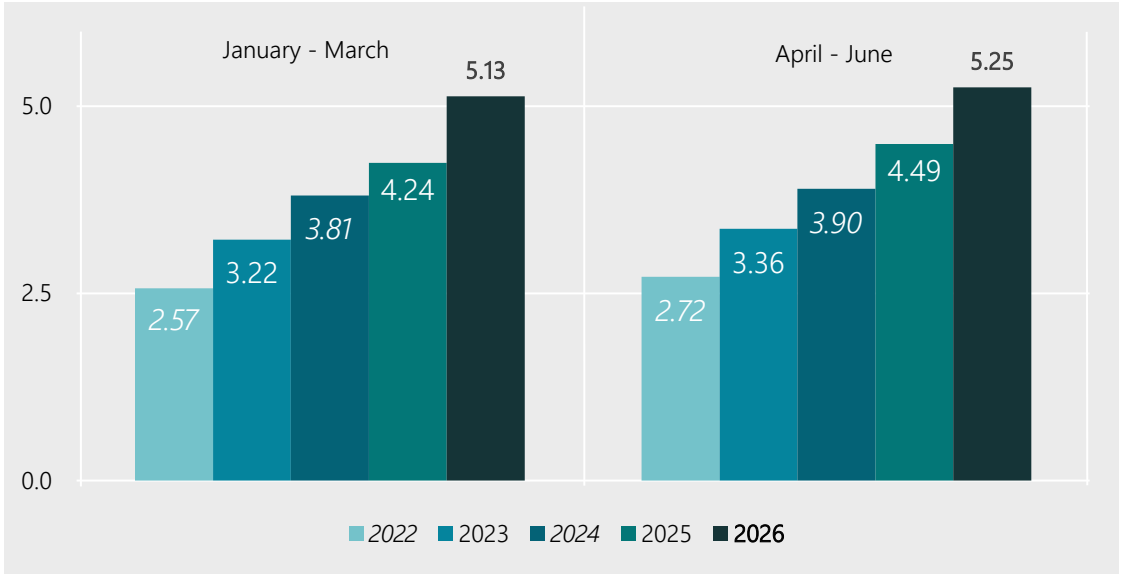
MARKET SHARES (%)

JUNE 2026

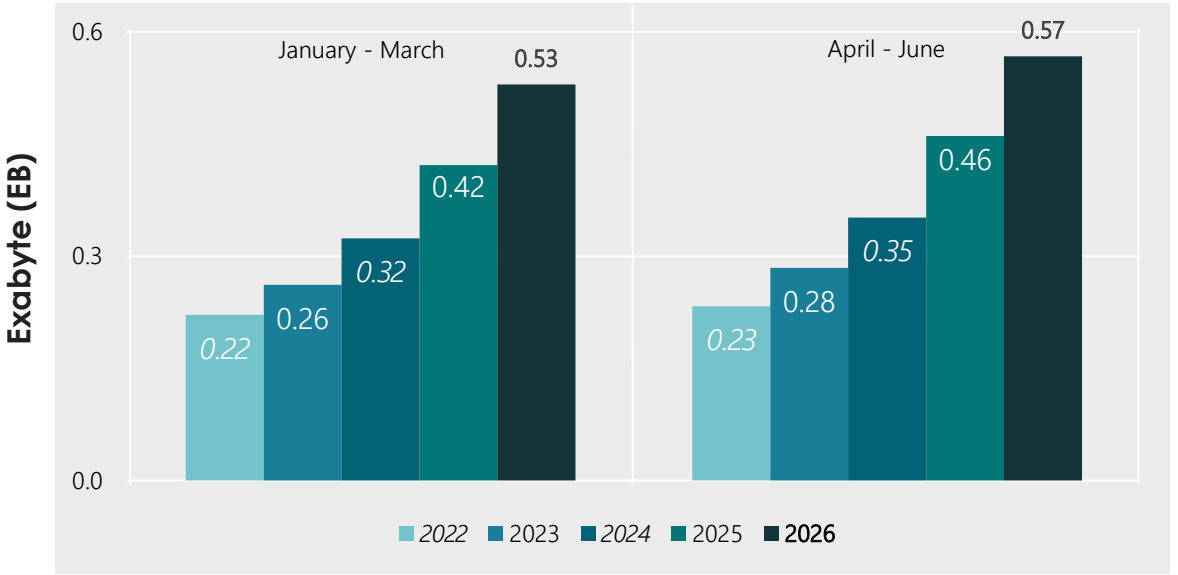


1.11 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD

DOWNLOAD (cumulative monthly data)



UPLOAD (cumulative monthly data)



1 **Cumulative data since the beginning of the year** (Jan. – Jun.)

	(2022)		(2023)		(2024)		(2025)		(2026)
Exabyte	5.28	**+24.5%**	6.58	**+17.0%**	7.70	**+13.5%**	8.74	**+18.8%**	10.38
									+96.5%

2 **Monthly daily average comparision (change %)**

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+26.0	+15.4	+13.1	+23.5	+103.3
February	+26.9	+20.9	+8.4	+21.2	+101.6
March	+23.6	+18.5	+12.8	+18.2	+95.2
Avril	+24.5	+16.2	+14.0	+15.2	+89.9
May	+23.6	+17.0	+15.1	+17.1	+95.0
June	+22.8	+14.4	+17.0	+18.3	+94.4

1 **Cumulative data since the beginning of the year** (Jan. – Jun.)

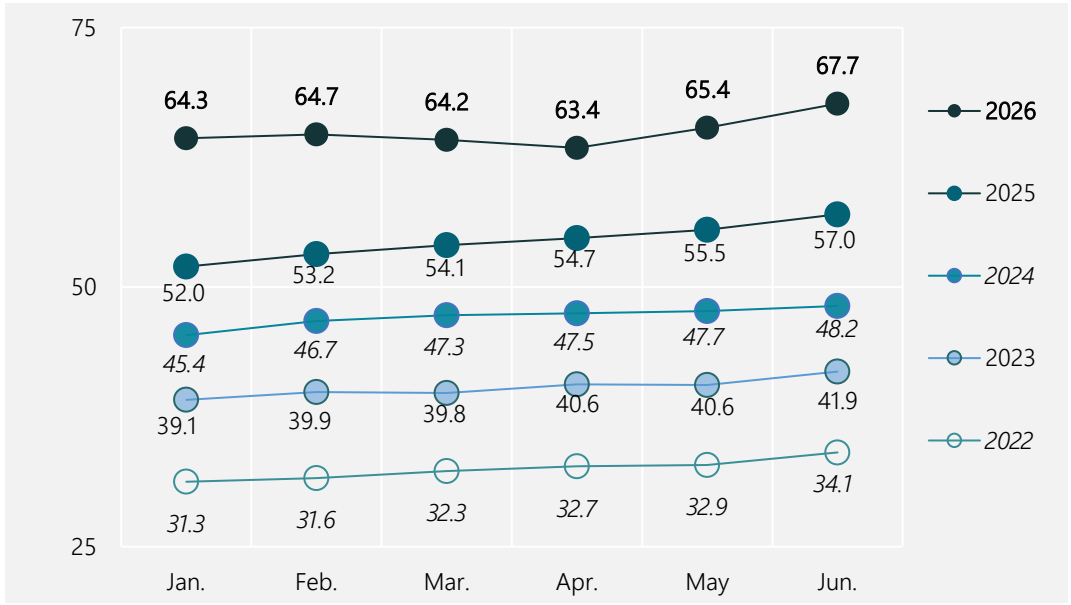
	(2022)		(2023)		(2024)		(2025)		(2026)
Exabyte	0.45	**+20.1%**	0.55	**+23.6%**	0.68	**+30.7%**	0.88	**+24.3%**	1.10
									+141.2%

2 **Monthly daily average comparision (change %)**

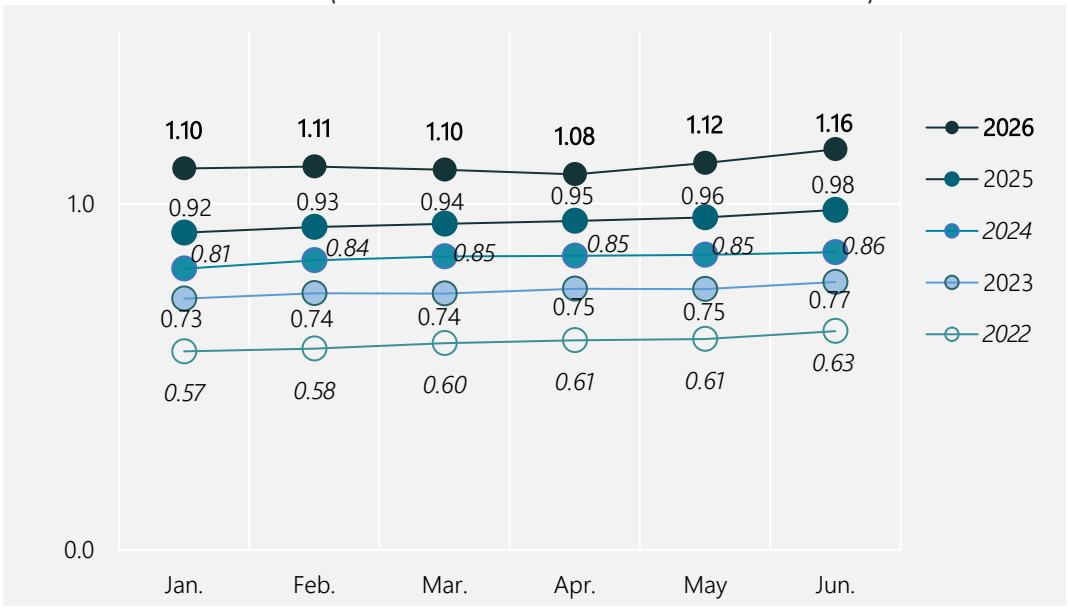
	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+16.1	+21.8	+31.3	+26.4	+134.6
February	+19.4	+26.2	+27.6	+26.1	+142.4
March	+19.2	+23.0	+31.9	+24.2	+140.3
Avril	+20.4	+24.1	+29.7	+23.2	+138.6
May	+22.1	+23.7	+30.9	+23.4	+144.2
June	+23.3	+23.1	+32.4	+22.9	+147.1

1.12 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

TOTAL TRAFFIC



PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



1 Average daily comparison since the beginning of the year (Jan. – Jun.)

	(2022)		(2023)		(2024)		(2025)		(2026)
Petabyte	32.5	+24.2%	40.3	+16.9%	47.1	+15.5%	54.4	+19.3%	64.9
								+100.0%	

2 Monthly daily average comparision (change %)

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+25.2	+15.9	+14.6	+23.8	+105.9
February	+26.3	+17.1	+13.8	+21.6	+104.8
March	+23.3	+18.9	+14.3	+18.7	+98.8
Avril	+24.2	+16.8	+15.3	+15.9	+93.8
May	+23.5	+17.5	+16.4	+17.7	+98.9
June	+22.9	+15.1	+18.3	+18.7	+98.6

1 Average daily comparison since the beginning of the year (Jan. – Jun.)

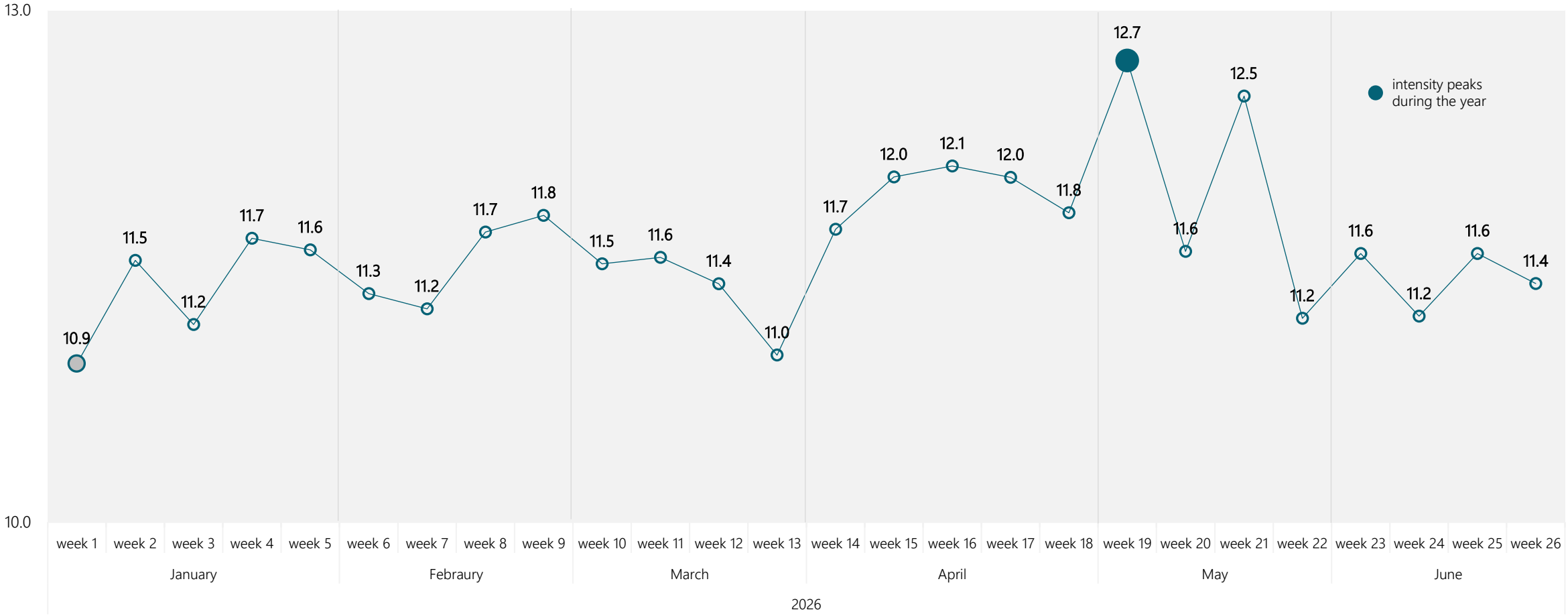
	(2022)		(2023)		(2024)		(2025)		(2026)
Giga byte	0.60	+24.7%	0.75	+12.7%	0.84	+12.4%	0.95	+17.3%	1.11
								+85.2%	

2 Monthly daily average comparision (change %)

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+26.6	+11.9	+12.8	+20.2	+92.1
February	+27.4	+12.9	+11.4	+18.8	+90.3
March	+24.0	+14.5	+11.2	+16.6	+83.9
Avril	+24.5	+12.6	+11.8	+14.2	+79.0
May	+23.7	+13.1	+12.7	+16.4	+83.6
June	+22.4	+11.1	+14.2	+17.8	+83.1

1.6 MOBILE NETWORK: WEEKLY DATA TRAFFIC INTENSITY

Data traffic intensity in Tbps (Terabit per second)

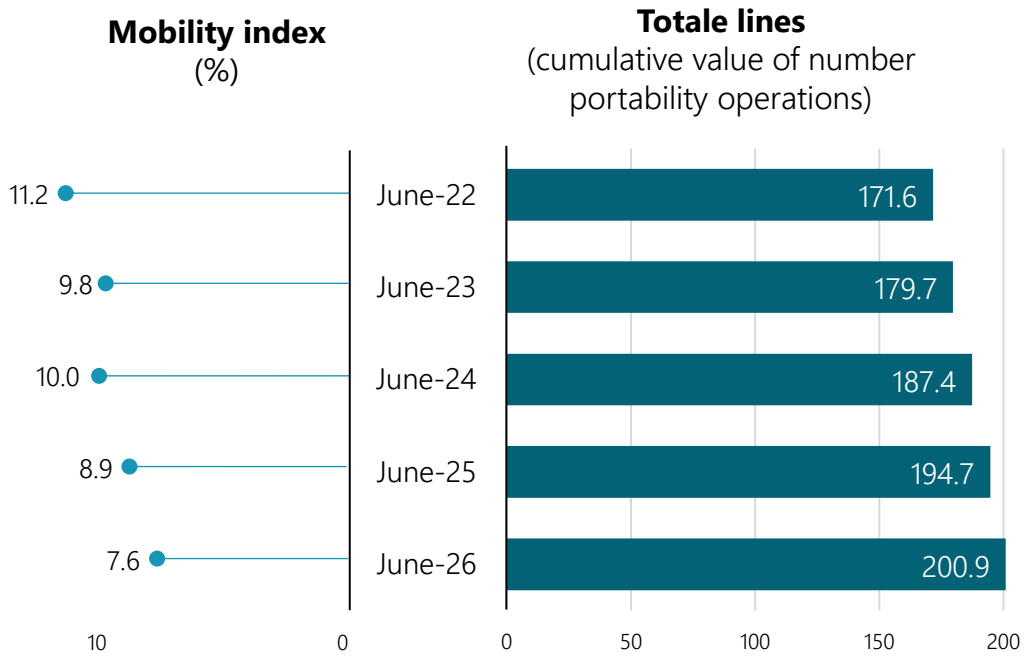


Note: starting from January 2026, a change was made to the methodology used for monitoring traffic intensity by collecting the weekly peak, in Tbps, of inbound data traffic volume into the operator's network, measured over a time interval ranging between 5 and 60 minutes.
The figure shows the sum of the peak recorded by each operator during the week, which serves as an indicator of the overall intensity managed on mobile networks during that week.
In some cases, the week overlaps two months..

1.14 MOBILE NETWORK: NUMBER PORTABILITY

In one year (Jun. 2025 – Jun. 2026). there have been

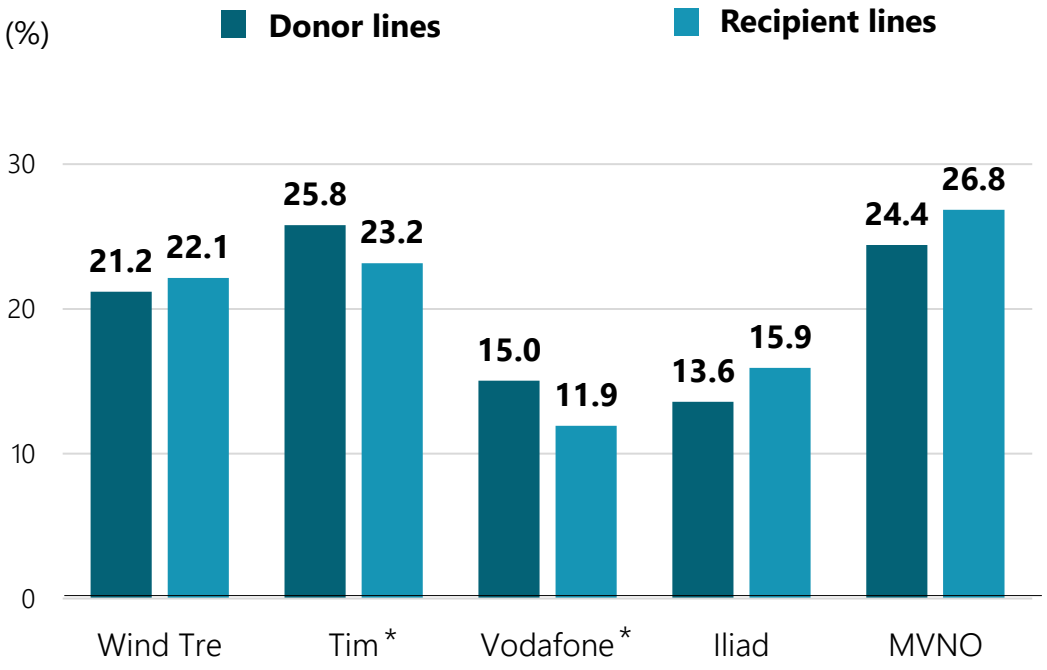
6.2 million of Mobile Number Portability (MNP) operations



Mobility index: the ratio between (i) total donating lines plus total recipient lines since the beginning of the year. and (ii) the corresponding average costumer base (net off M2M sims)

DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months)

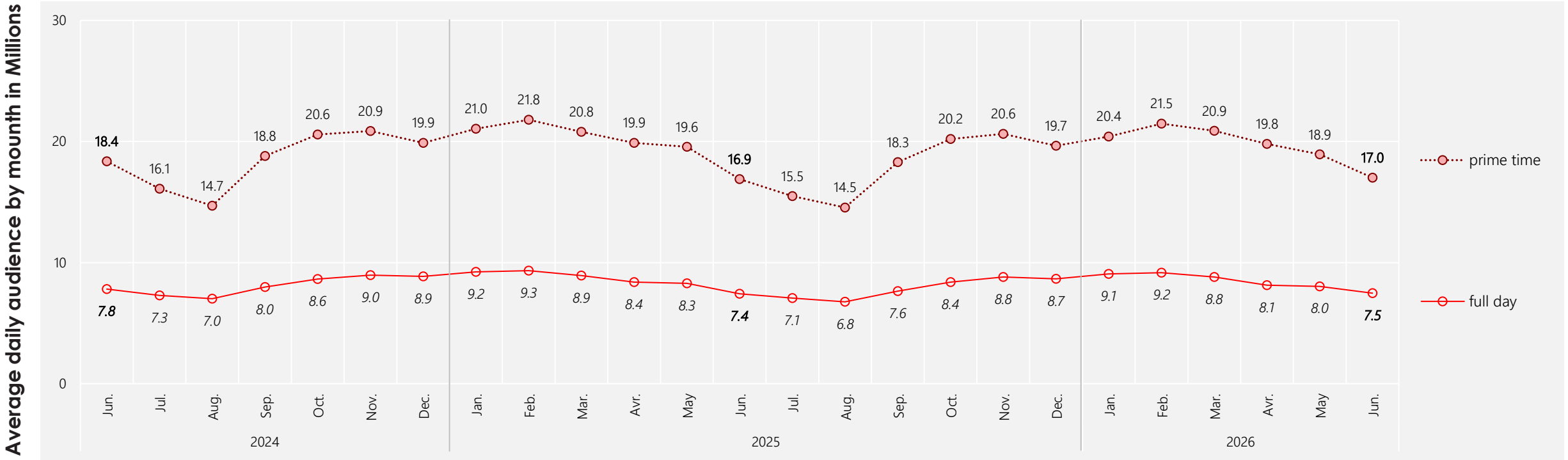
JUNE 2026



(*) Note: the data collected on TIM and Vodafone include the lines of the subsidiaries. respectively Kena mobile and VEI (which offers mobile telephony services called .ho)

2.1 TELEVISION (DVB-T. SAT. IP): TOTAL AUDIENCE OF NATIONAL BROADCASTER

June 2024 – June 2026



Trend in average daily viewership
(Average daily audience Jan. – Jun. in millions)

daily audience - Prime time
(Time slot: 20:30 – 22.30)

(2024)		(2025)		(2026)
20.61	↓ **-3.0%**	19.99	↓ **-1.2%**	19.74
				↓ **-4.2%**

daily audience – full day
(Time slot: 02:00 – 25:59)

8.81	↓ **-2.5%**	8.59	↓ **-1.7%**	8.44
				↓ **-4.2%**

Average Minute Audience (AMR): the average audience of a programme calculated as the sum of the number of viewers recorded in each minute of a given period divided by the duration of the period. expressed in minutes. For digital devices the corresponding metric is AMR-D. which measures the average number of devices per minute

Share: the percentage of viewers of a channel. calculated as the ratio between the viewers of that channel and total viewers watching television across all channels during the same period

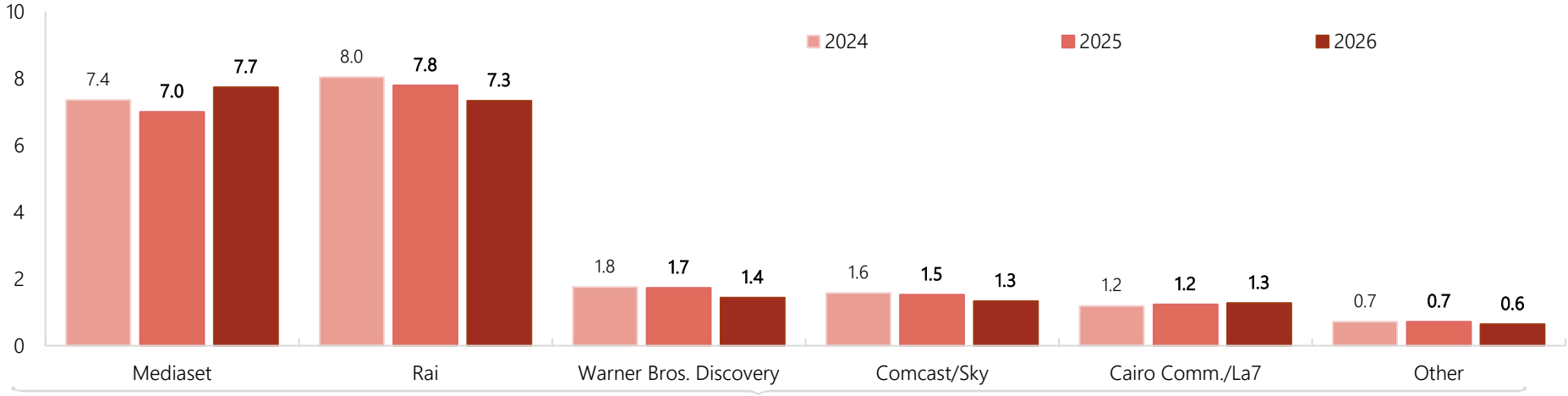
Note: The data refer to the Total Audience metric Live+Vosdal+VOD All Screen

Source: Agcom elaboration on Auditel data

2.2 TELEVISION (DVB-T. SAT. IP): LEADING TV BROADCASTER BY AUDIENCE PRIME TIME (since the beginning of the year)

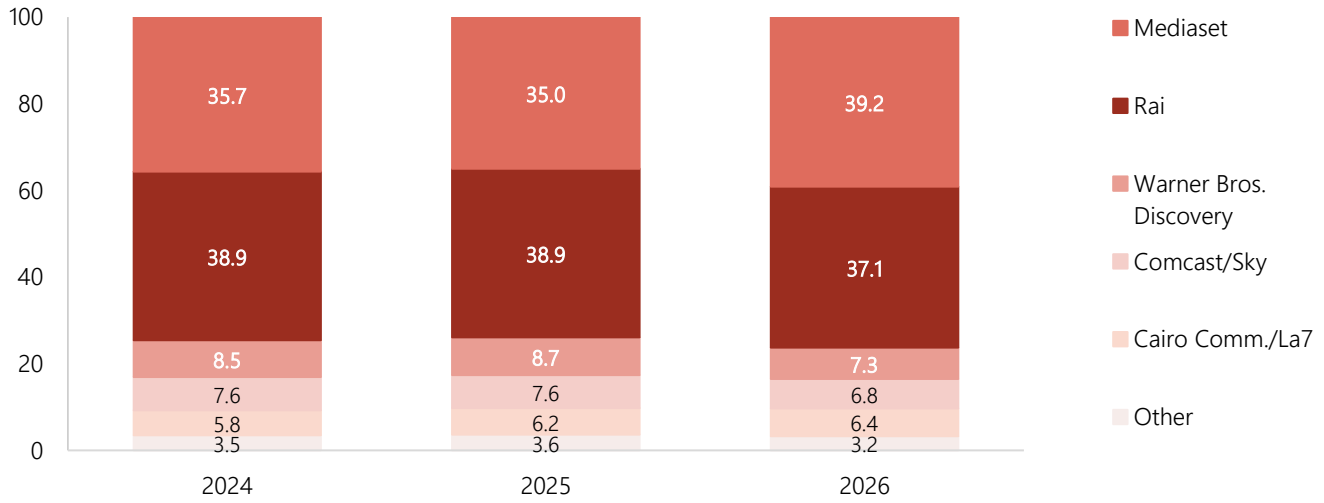
PRIME TIME AUDIENCE

Average daily audience since the beginning of the year (Jan. – Jun. in millions)



	Change % '24-'26	Change % '25-'26
Rai	-8.7	-5.9
Mediaset	+5.1	+10.5
Warner Bros. Discovery	-18.0	-17.0
Comcast/Sky	-15.4	-12.5
Cairo Comm./La7	+7.1	+3.2
Others	-10.7	-10.8

Average share in %



	Change percentage points '24-'26	Change percentage points '25-'26
Rai	-1.8	-1.8
Mediaset	+3.5	+4.1
Warner Bros. Discovery	-1.2	-1.4
Comcast/Sky	-0.9	-0.9
Cairo Comm./La7	+0.7	+0.3
Others	-0.2	-0.3

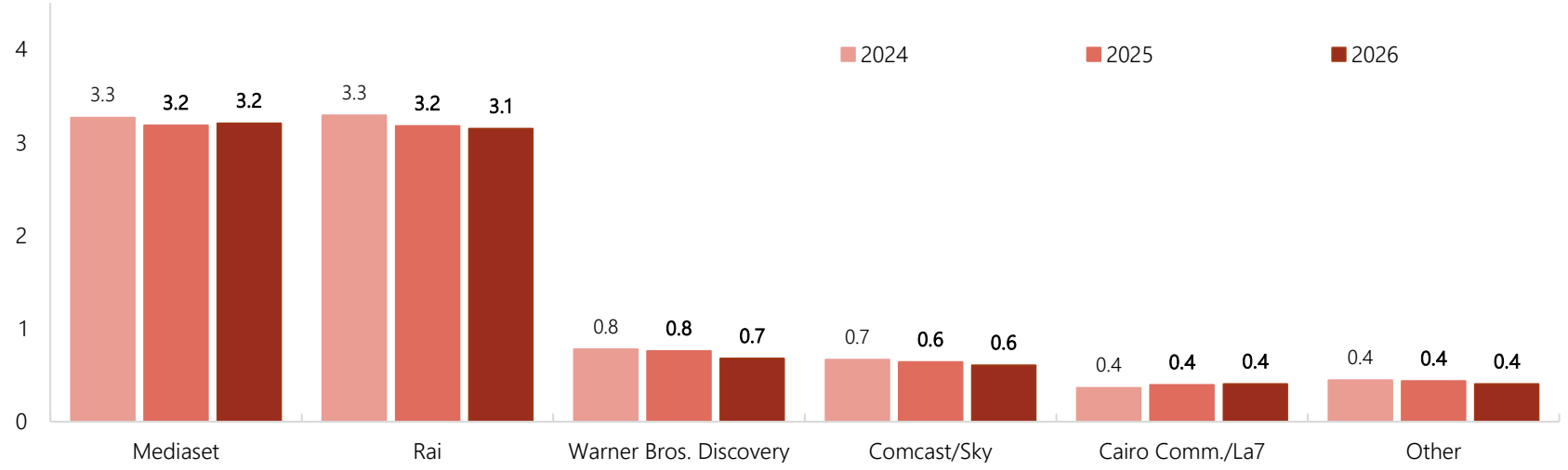
Note: Note: The data refer to the Total Audience metric Live+Vosdal+VOD All Screen

Source: Agcom elaboration on Auditel data

2.3 TELEVISION (DVB-T. SAT. IP): LEADING TV BROADCASTER BY AUDIENCE WHOLE DAY (since the beginning of the year)

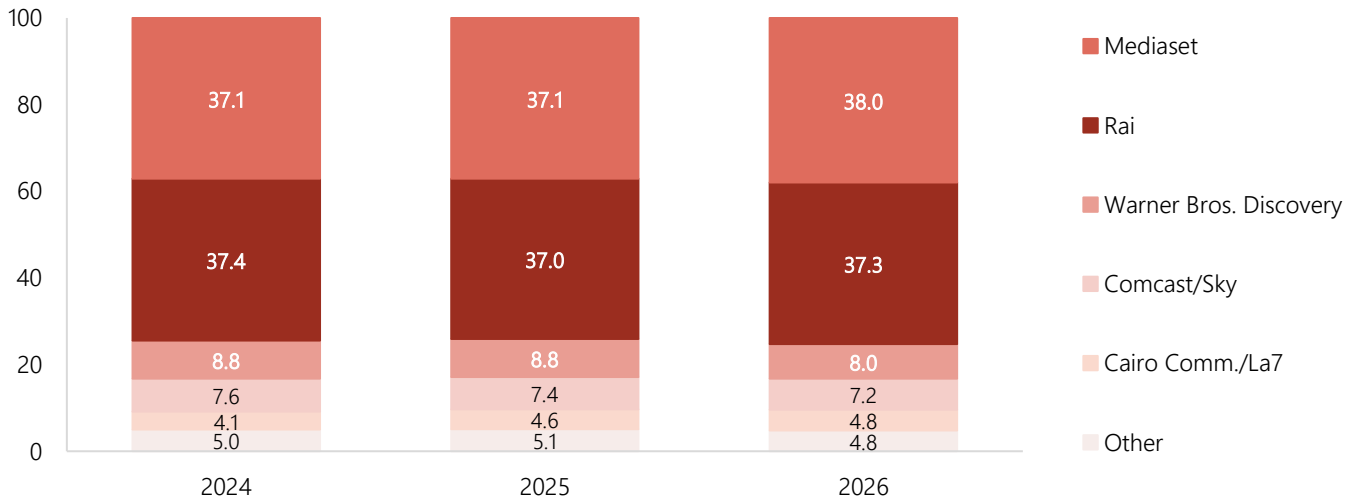
AVERAGE DAILY AUDIENCE – WHOLE DAY

Average daily audience since the beginning of the year (Jan. – Jun. in millions)



	Change % '24-'26	Change % '25-'26
Mediaset	-4.5	-1.0
Rai	-1.9	+0.7
Warner Bros. Discovery	-12.8	-10.7
Comcast/Sky	-9.2	-5.4
Cairo Comm./La7	+10.9	+2.1
Others	-9.0	-7.2

Average share in %



	Change percentage points '24-'26	Change percentage points '25-'26
Mediaset	-0.10	0.28
Rai	+0.89	+0.91
Warner Bros. Discovery	-0.79	-0.81
Comcast/Sky	-0.39	-0.28
Cairo Comm./La7	+0.65	+0.18
Others	-0.26	-0.28

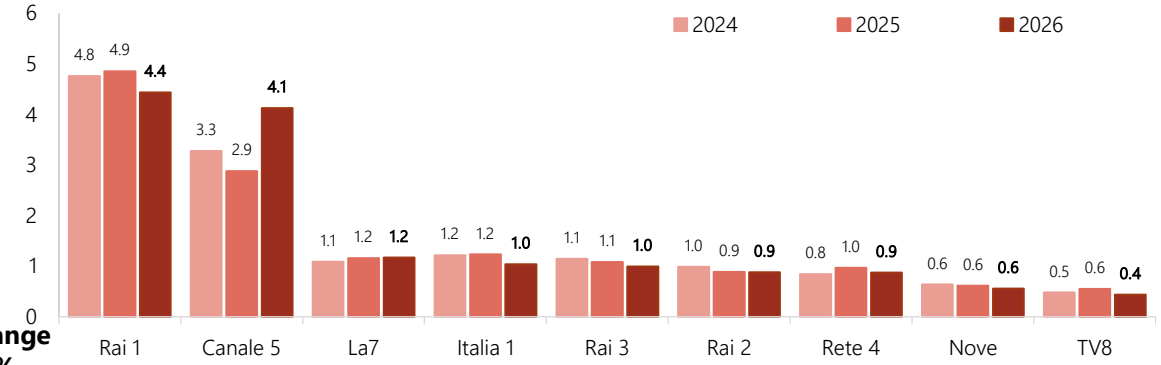
Note: The data refer to the Total Audience metric Live+Vosdal+VOD All Screen

Source: Agcom elaboration on Auditel data

2.4 TELEVISION (DVB-T. SAT. IP): LEADING TV CHANNELS BY AUDIENCE (since the beginning of the year)

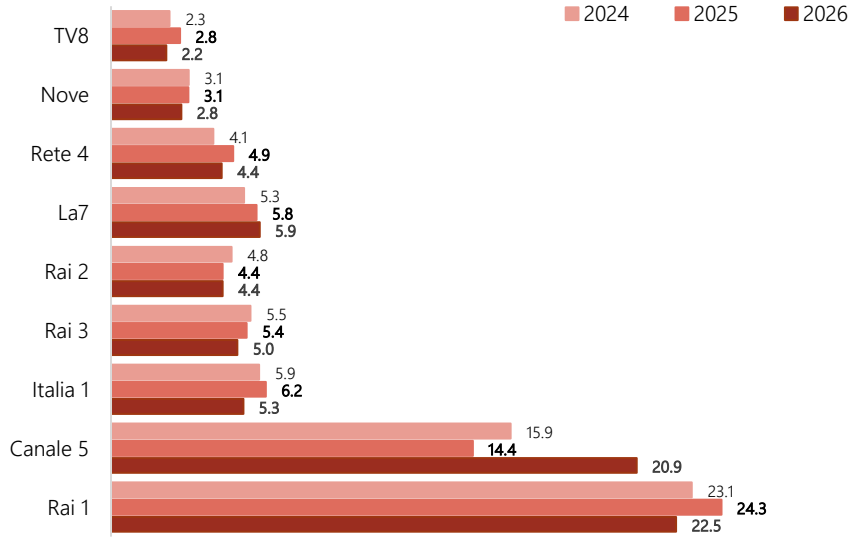
AVERAGE DAY– PRIME TIME

Average daily audience (Jan. – Jun. in millions)



Change %	Rai 1	Canale 5	La7	Italia 1	Rai 3	Rai 2	Rete 4	Nove	TV8
'24-'26	-6.8	+26.0	+7.0	-14.5	-13.1	-11.3	+3.7	-13.1	-9.5
'25-'26	-8.6	+43.5	+0.8	-15.6	-8.0	-1.1	-10.4	-10.2	-21.0

Share in %



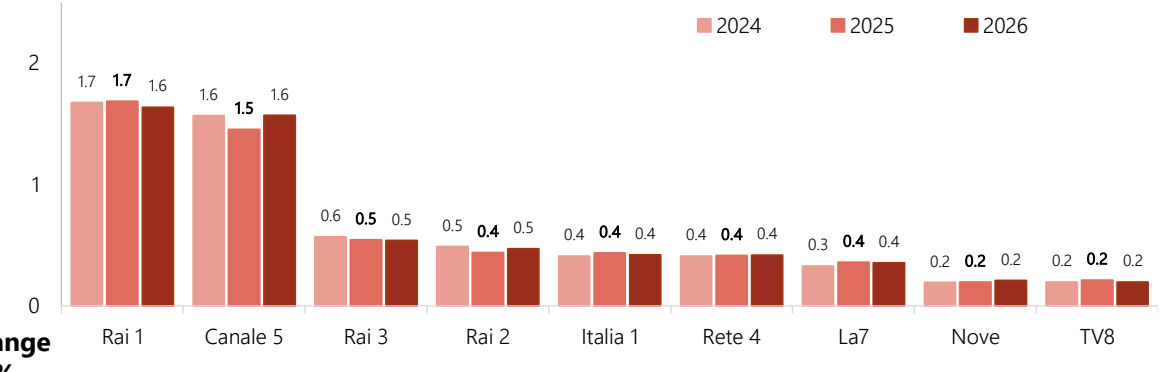
Change percentage points

Channel	'25-'26
Rai 1	-1.8
Canale 5	+6.5
Italia 1	-0.9
Rai 3	-0.4
Rai 2	0.0
La7	+0.1
Rete 4	-0.4
Nove	-0.3
TV8	-0.6

Note: The data refer to the Total Audience metric Live+Vosdal+VOD All Screen

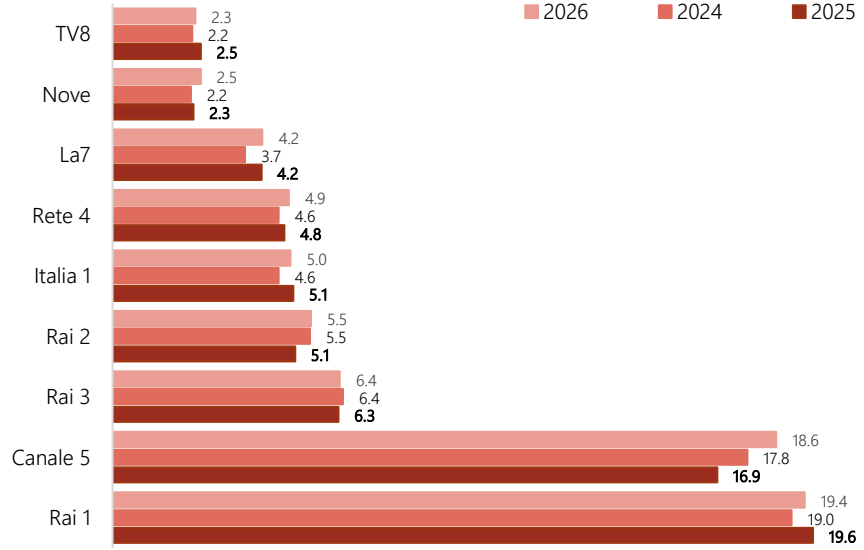
AVERAGE DAY – WHOLE DAY

Average daily audience (Jan. – Jun. in millions)



Change %	Rai 1	Canale 5	Rai 3	Rai 2	Italia 1	Rete 4	La7	Nove	TV8
'24-'26	-2.4	+0.2	-5.5	-3.8	+2.7	+1.7	+8.3	+7.8	-0.1
'25-'26	-2.9	+7.8	-1.1	+6.7	-3.3	+0.8	-1.1	+7.0	-7.6

Share in %



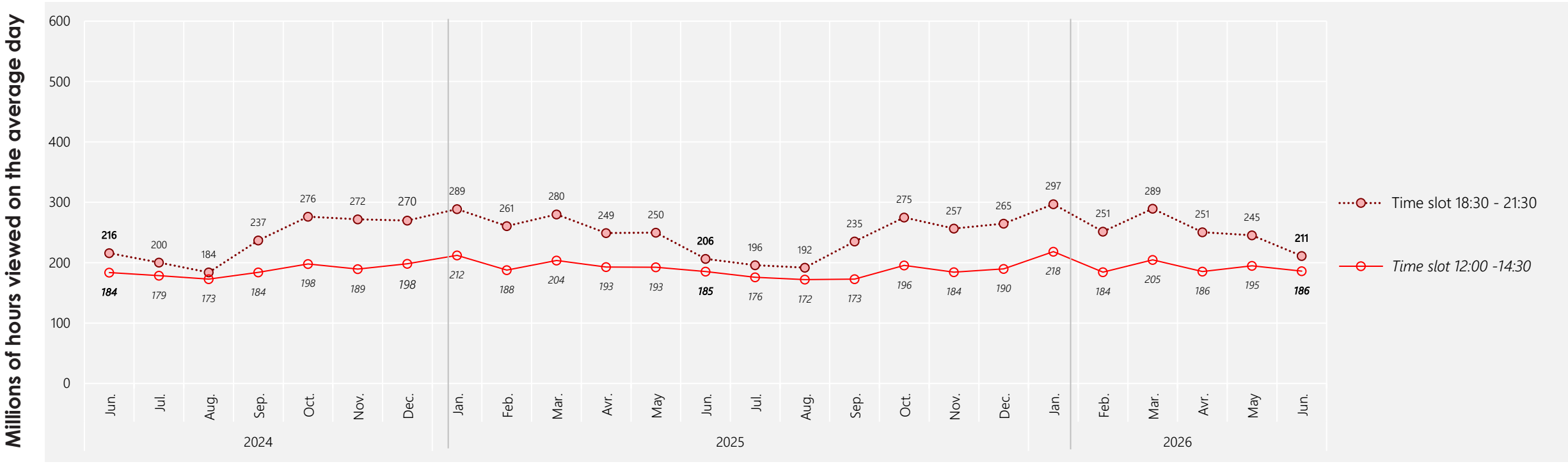
Change percentage points

Channel	'25-'26
Rai 1	-0.2
Canale 5	+1.6
Rai 3	0.0
Rai 2	+0.4
Italia 1	-0.1
Rete 4	+0.1
La 7	0.0
Nove	+0.2
TV8	-0.1

Source: Agcom elaboration on Auditel data

2.5 TELEVISION (DVB-T. SAT. IP): TOTAL TIME SPENT OF THE MAIN NATIONAL NEWS PROGRAMS*

June 2024 – June 2026



Trend in total time spent by viewers

(Jan. – Jun. Time in millions of hours)

	(2024)		(2025)		(2026)
Time slot: 18:30 – 21:30	1.543	-0.5%	1.535	+0.7%	1.545
					+0.1%
Time slot: 12:00 – 14:30	1.177	-0.2%	1.174	=	1.174
					-0.3%

*** Total time spent:** is the sum of the time spent by each viewer. on the average day during the reference period. watching editions of television news programmes (*Telegiornali*) within the time slots considered.

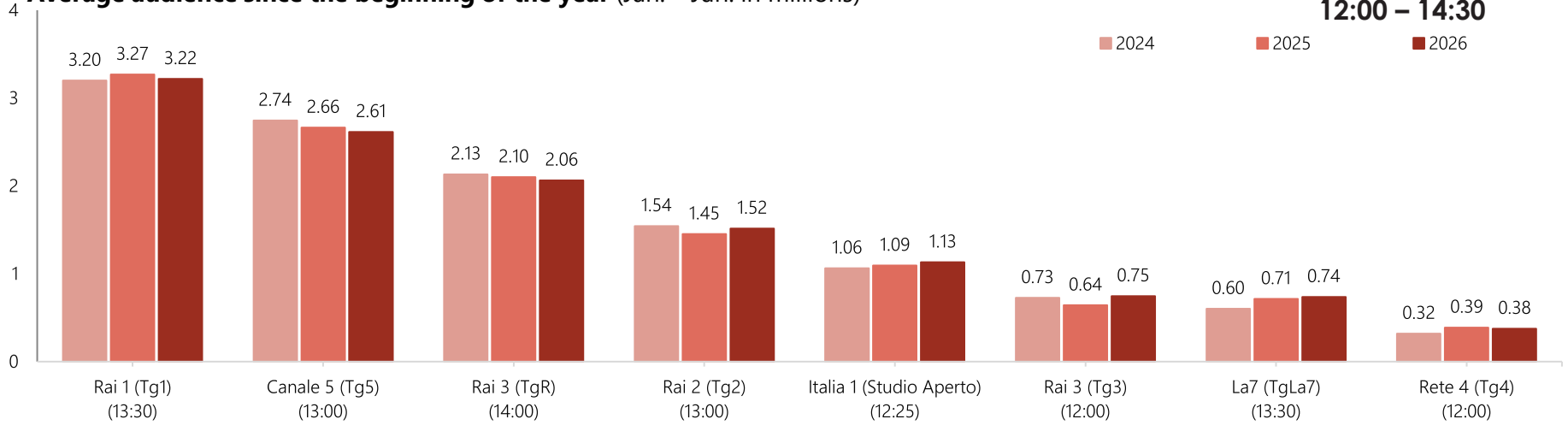
Note: The data refer to the Total Audience metric Live+Vosdal+VOD All Screen

Source: Agcom elaboration on Auditel data

2.6 TELEVISION (DVB-T. SAT. IP): AVERAGE DAILY AUDIENCE OF MAIN NATIONAL NEWS PROGRAMS (since the beginning of the year)

Average audience since the beginning of the year (Jan. – Jun. in millions)

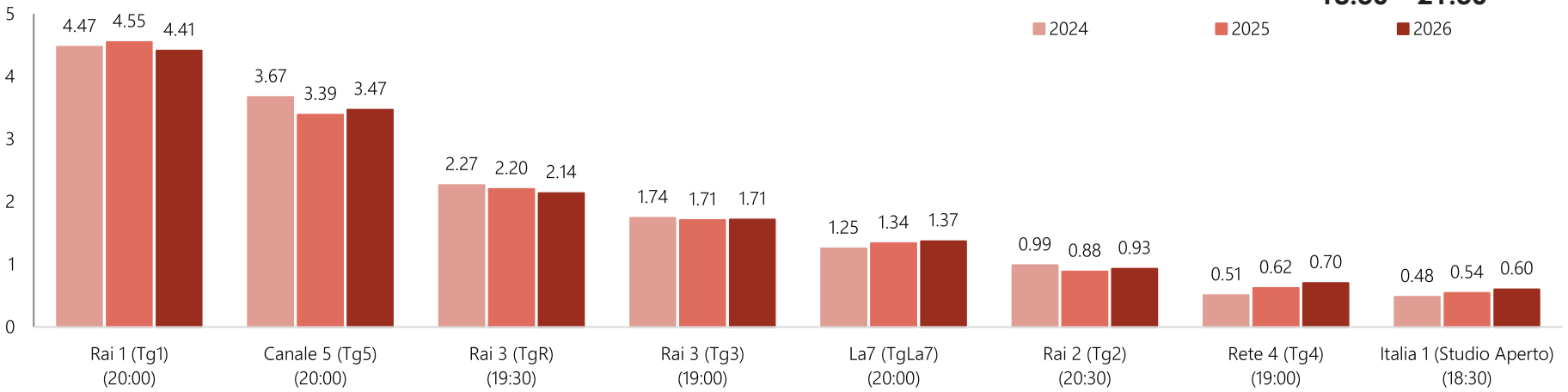
TIME SLOT: 12:00 – 14:30



	Channel/TG	Change % '25-'26	Change % '24-'26
Rai	Rai 1 (Tg1 - 13:30)	-1.5	+0.6
	Rai 2 (Tg2 - 13:00)	+4.4	-1.8
	Rai 3 (Tg3 - 12:00)	+16.3	+2.8
	Rai 3 (TgR - 14:00)	-1.8	-3.3
Mediaset	Canale 5 (Tg5 - 13:00)	-1.9	-4.7
	Italia 1 (Studio Aperto - 12:25)	+3.4	+6.5
	Rete 4 (Tg4 - 12:00)	-3.3	+17.9
Cairo Comm.	La7 (TgLa7 - 13:30)	+3.3	+22.4

Average audience since the beginning of the year (Jan. – Jun. in millions)

TIME SLOT 18:30 – 21:30



	Channel/TG	Change % '25-'26	Change % '24-'26
Rai	Rai 1 (Tg1 - 20:00)	-3.0	-1.4
	Rai 2 (Tg2 - 20:30)	+5.0	-5.7
	Rai 3 (Tg3 - 19:00)	+0.6	-1.6
	Rai 3 (TgR - 19:30)	-2.9	-5.6
Mediaset	Canale 5 (Tg5 - 20:00)	+2.3	-5.5
	Italia 1 (Studio Aperto - 18:30)	+11.2	+25.2
	Rete 4 (Tg4 - 19:00)	+13.0	+38.5
Cairo Comm.	La7 (TgLa7 - 20:00)	+2.5	+9.3

Note: The data refer to the Total Audience metric Live+Vosdal+VOD All Screen

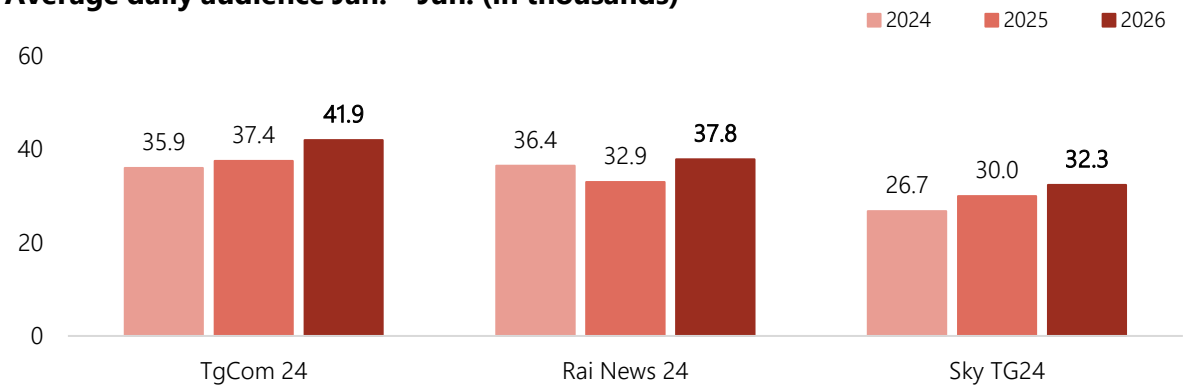
Source: Agcom elaboration on Auditel data

2.7 TELEVISION (DVB-T. SAT.IP): AVERAGE DAILY AUDIENCE OF MAIN NATIONAL «ALL NEWS PROGRAMS» (since the beginning of the year)

The «all news » channels considered in the analysis are: Rai News 24 – Sky Tg 24 - TgCom 24

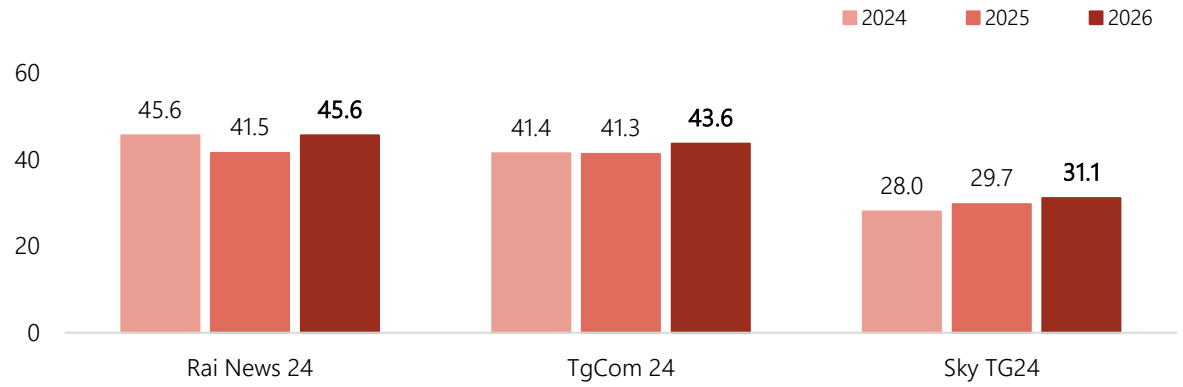
AVERAGE DAY – PRIME TIME

Average daily audience Jan. – Jun. (in thousands)



AVERAGE DAY – ALL DAY

Average daily audience Jan. – Jun. (in thousands)



Average daily audience Jan. – Jun. (in thousands)

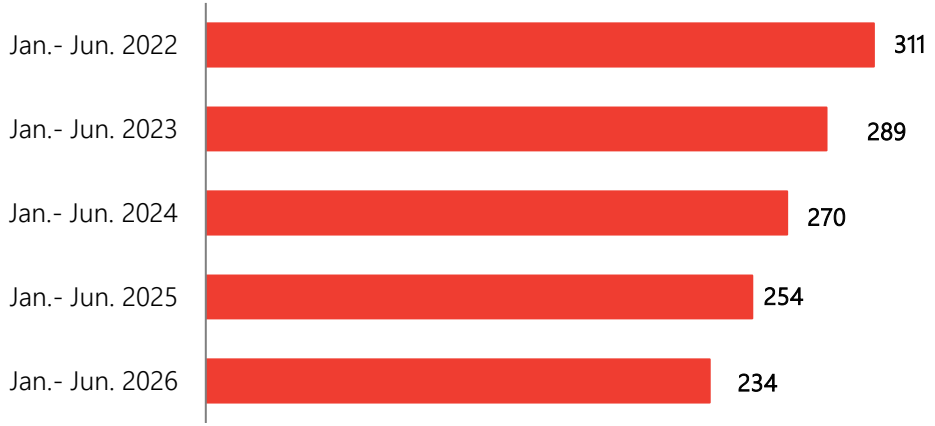
	Year	Whole Day	07:00 09:00	12:00 15:00	20:30 22:30
Rai News 24	2026	45.6	91.6	49.6	37.8
	2025	41.5	84.4	47.5	32.9
	2024	45.6	96.5	52.8	36.4
Change %	2025-2026	*+9.8*	*+8.5*	*+4.4*	*+14.8*
	2024-2026	*- 0.05*	*- 5.13*	*- 6.04*	*+ 3.85*
TgCom 24	2026	43.6	80.9	77.0	41.9
	2025	41.3	75.1	72.6	37.4
	2024	41.4	82.3	68.8	35.9
Change %	2025-2026	*+5.8*	*+7.7*	*+6.1*	*+12.0*
	2024-2026	*+5.4*	*-1.8*	*+11.9*	*+16.6*
Sky Tg24	2026	31.1	48.7	52.9	32.3
	2025	29.7	51.1	50.4	30.0
	2024	28.0	53.9	45.5	26.7
Change %	2025-2026	*+4.6*	*-4.6*	*+4.9*	*+7.8*
	2024-2026	*+11.1*	*-9.8*	*+16.1*	*+20.8*

Note: The data refer to the Total Audience metric Live+Vosdal+VOD All Screen

Source: Agcom elaboration on Auditel data

2.8 NEWSPAPERS: DAILY COPIES SOLD SINCE THE BEGINNING YEAR (1/2)

CUMULATIVE SALES
(copies sold in millions)

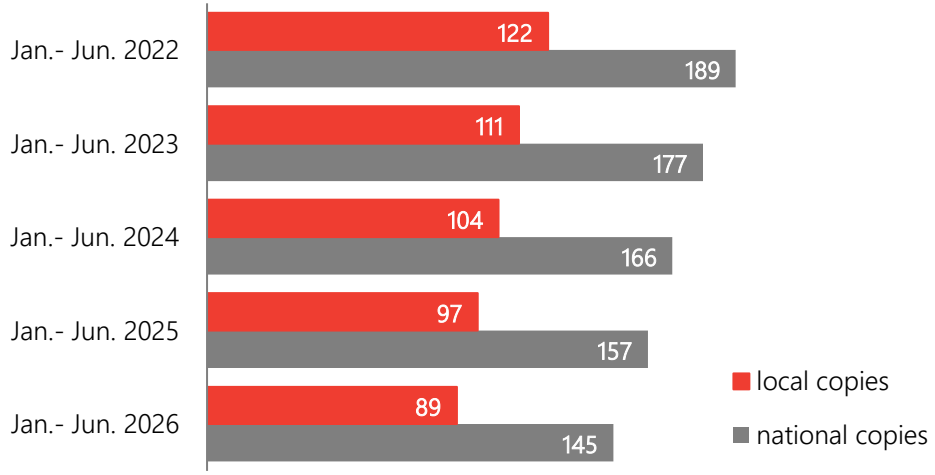


Change in %
Period Jan. – Jun

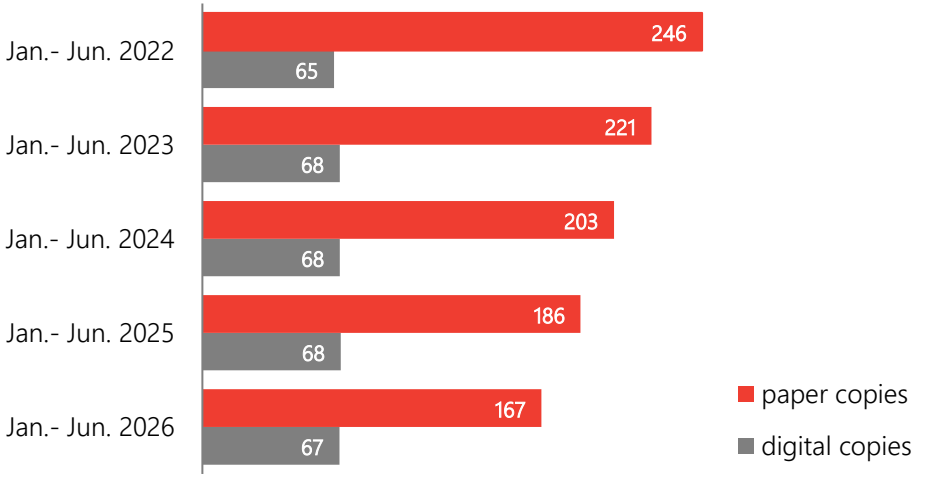
	(2025 – 2026)	(2022 – 2026)
Total copies:	**-7.8** ↓	**-24.6** ↓
Paper copies:	**-10.3** ↓	**-32.1** ↓
Digital copies:	**-0.8** ↓	**+4.2** ↑
National newspapers copies:	**-7.8** ↓	**-23.1** ↓
Local newspapers copies:	**-7.8** ↓	**-26.8** ↓

CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



PAPER vs. DIGITAL COPIES



Note: Digital and multiple copies are included. including those priced at less than 30 per cent of the price of the print version. Consequently. the data in this edition of the report are not entirely comparable with those of previous editions. in which copies priced at less than 30 per cent of the price of the print version were excluded from the survey.

Source: Agcom elaboration from AGCOM and ADS data

2.9 NEWSPAPERS: DAILY COPIES SOLD SINCE THE BEGINNING OF THE YEAR (2/2)

PAPER COPIES BY NEWSPAPER MACRO-CATEGORY

(copies sold in millions)

	Jan. – Jun.	2022	2023	2024	2025	2026
National newspapers	General press - Top 5	71.5	62.9	58.4	53.8	48.1
	Other general press	29.4	27.0	24.3	22.2	19.9
	Business	9.9	8.8	7.2	6.5	5.7
	Sport	26.7	24.8	23.0	21.9	18.8
Local newspapers	Top 10	54.4	49.4	45.9	41.3	37.1
	Other	54.0	48.2	43.8	40.5	37.3

Change in %	Jan. – Jun.	('22 – '26)	('25 – '26)
National newspapers	General press Top 5	-32.8 ↓	-10.6 ↓
	Other general press	-32.5 ↓	-10.7 ↓
	Business	-42.0 ↓	-11.4 ↓
	Sports	-29.4 ↓	-13.9 ↓
Local newspapers	Top 10	-31.8 ↓	-10.2 ↓
	Others	-30.9 ↓	-7.8 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in millions)

	Jan. – Jun.	2022	2023	2024	2025	2026
National newspapers	General press - Top 5	30.4	31.3	31.9	31.9	32.3
	Other general press	5.0	5.1	5.1	5.0	5.3
	Business	12.9	12.9	12.6	12.4	11.7
	Sport	2.9	4.3	3.6	3.8	3.3
Local newspapers	Top 10	6.8	7.1	7.4	7.7	7.7
	Other	6.7	6.8	7.0	7.3	7.1

Change in %	Jan. – Jun.	('22 – '26)	('25 – '26)
National newspapers	General press Top 5	+6.0 ↑	+1.2 ↑
	Other general press	+5.9 ↑	+6.1 ↑
	Business	-9.0 ↓	-5.0 ↓
	Sports	+13.0 ↑	-13.4 ↓
Local newspapers	Top 10	+13.3 ↑	+0.5 ↑
	Others	+6.5 ↑	-2.5 ↓

Newspapers categories

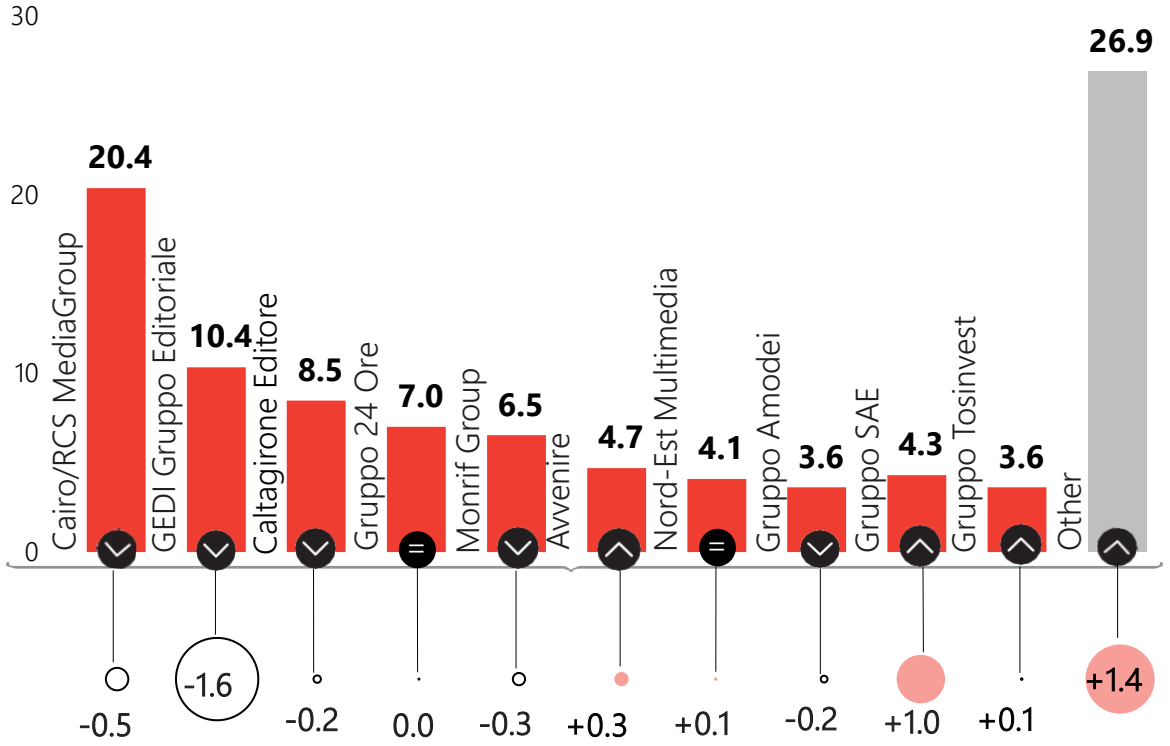
- National general press newspapers – Top 5: in terms of total sales in 2Q2026: Corriere della Sera. La Repubblica. Avvenire. La Stampa. Il Fatto Quotidiano.
- Other national general press: Il Fatto quotidiano. Il Giornale. Il Manifesto. Il Tempo. La Verità. Libero.
- National sports newspapers: Corriere dello Sport. Gazzetta dello sport. Tuttosport.
- National business newspapers: Italia Oggi. Il Sole 24 Ore.
- Local newspapers – Top 10: in terms of total sales in 2Q2026: Il Resto del Carlino. Il Gazzettino. La Nazione. L'Eco di Bergamo. Il Messaggero Veneto. Dolomiten. Il Mattino. L'Unione Sarda. Giornale di Brescia. Gazzetta di Parma.
- Other local newspapers: remaining local newspapers considered by ADS.

Source: Agcom elaboration on data from AGCOM and ADS

2.10 NEWSPAPERS: VOLUME SALES AND SHARES BY MAIN PUBLISHING GROUPS

DISTRIBUTION OF TOTAL COPIES SOLD SINCE THE BEGINNING OF THE YEAR BY PUBLISHING GROUPS (%)

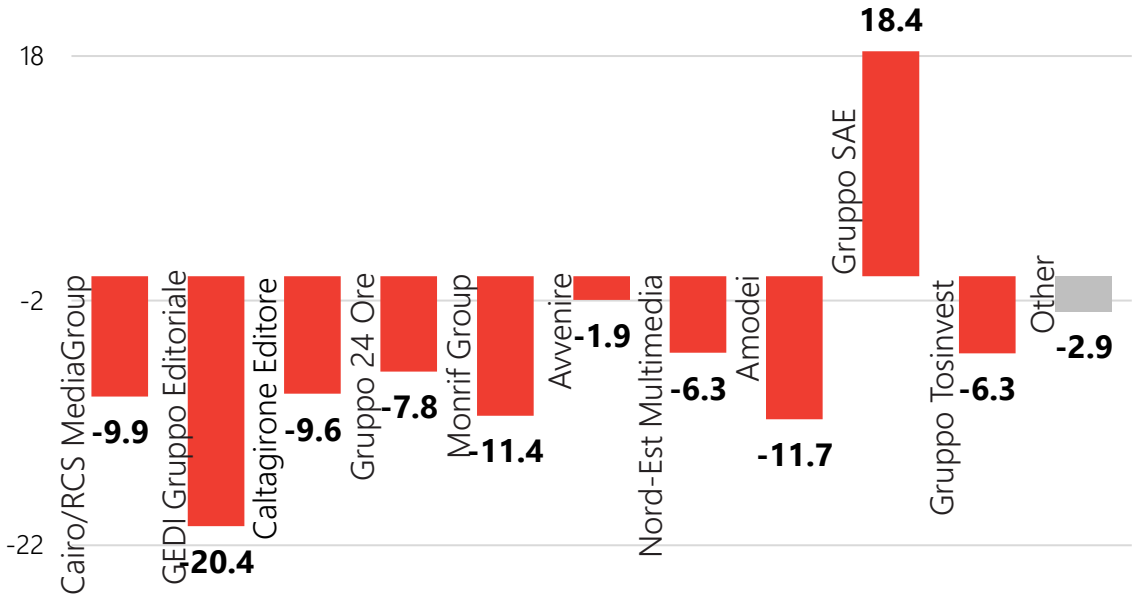
January – June 2026



Difference vs. Jan. – Jun 2025
(percentage points)

CHANGE IN TOTAL COPIES SOLD (%)

Difference vs. Jan. – Jun. 2025

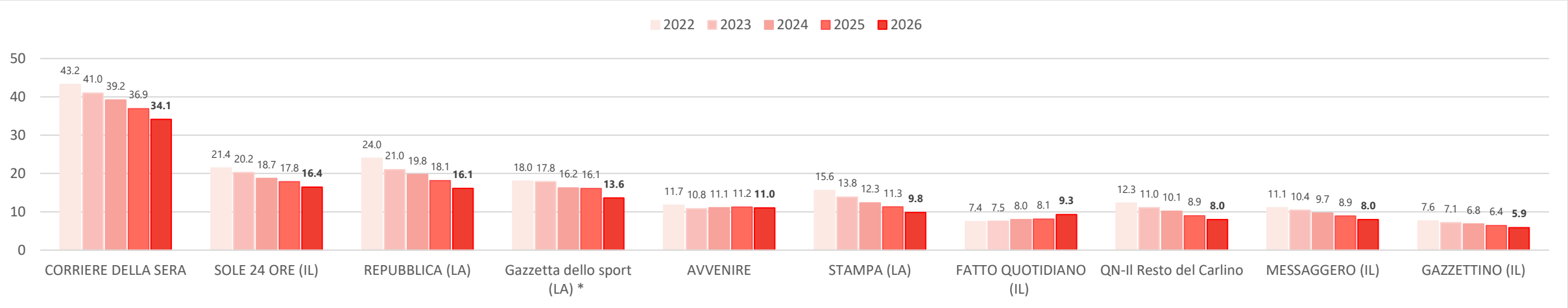


Nota: The GEDI group sold to Blue Media S.r.l. (MSC Group) the newspaper "Il Secolo XIX" with effect from 09/29/2024 and to SAE group the newspaper "La Provincia Pavese" with effect from 07/01/2025. Furthermore. effective June 1. 2026. it sold the newspaper "La Stampa" to the SAE group.

Source: Agcom elaboration on AGCOM and ADS data

2.11 NEWSPAPERS: DISTRIBUTION OF COPIES SOLD BY MAJOR NEWSPAPERS

Distribution of copies sold since the beginning of the year (Jan. – Jun. in millions)



Change.in milons of copies 26/22	CORRIERE DELLA SERA	SOLE 24 ORE (IL)	REPUBBLICA (LA)	Gazzetta dello sport (LA)*	AVVENIRE	STAMPA (LA)	FATTO QUOTIDIANO (IL)	QN-Il Resto del Carlino	MESSAGGERO (IL)	GAZZETTINO (IL)
TOTAL COPIES	-9.1	-5.0	-7.9	-4.4	-0.7	-5.8	1.9	-4.3	-3.1	-1.7
PAPER COPIES	-9.9	-3.6	-5.9	-4.7	-1.0	-5.7	-1.0	-4.6	-3.1	-1.6
DIGITAL COPIES	0.8	-1.3	-2.0	0.3	0.3	0.3	2.9	0.3	0.0	-0.1

Change.in millions of copies 26/25	CORRIERE DELLA SERA	SOLE 24 ORE (IL)	REPUBBLICA (LA)	Gazzetta dello sport (LA)*	AVVENIRE	STAMPA (LA)	FATTO QUOTIDIANO (IL)	QN-Il Resto del Carlino	MESSAGGERO (IL)	GAZZETTINO (IL)
TOTAL COPIES	-2.8	-1.4	-2.0	-2.4	-0.2	-1.5	1.2	-0.9	-1.0	-0.5
PAPER COPIES	-2.3	-0.7	-1.4	-1.9	-0.3	-1.4	-0.1	-1.0	-0.9	-0.5
DIGITAL COPIES	-0.4	-0.7	-0.6	-0.5	0.1	-0.1	1.3	0.0	0.0	-0.1

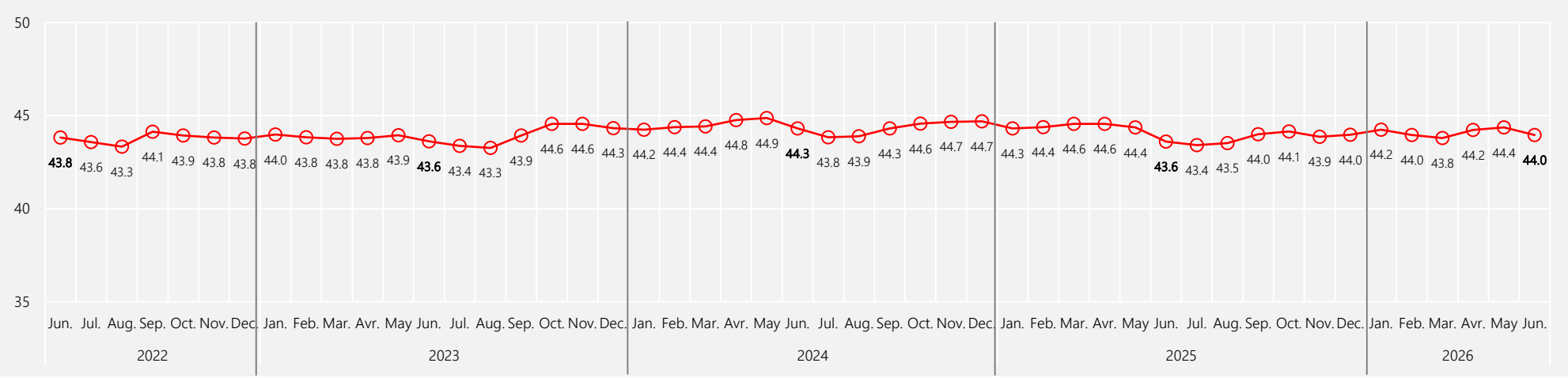
(*) – includes Monday edition

Source: Agcom elaboration on AGCOM and ADS data

2.12 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

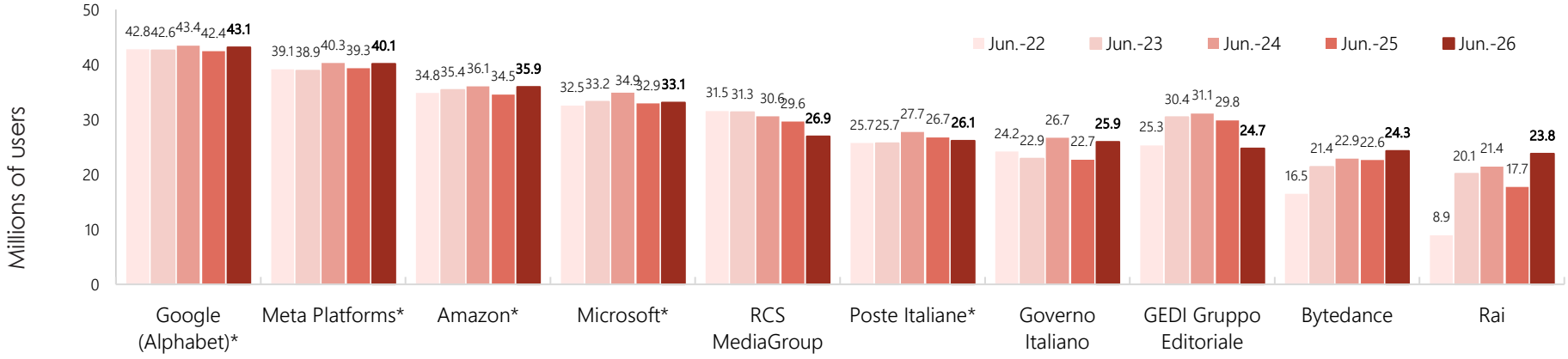
(June 2022 – June 2026)



43 millions and **963** thousands unique users logged on to the internet in June 2026 (+**352** thousands compared to June 2025)

More than **71** hours and **13** minutes spent on average by each user surfing the Internet in June 2026

UNIQUE USERS OF THE MAIN OPERATORS (Parent*)



Unique digital users: number of distinct individuals who visited a content of a website or application during the reference period. Users who visited a website or application multiple times during the same period are counted only once.

*** Parent** : a group of domains and URLs owned by a specific company. its subsidiaries or business units. In addition. a Parent may also be represented by an organization. government agency. private group. corporation or other institution. which holds a controlling interests in each domain and URL belong to the group.

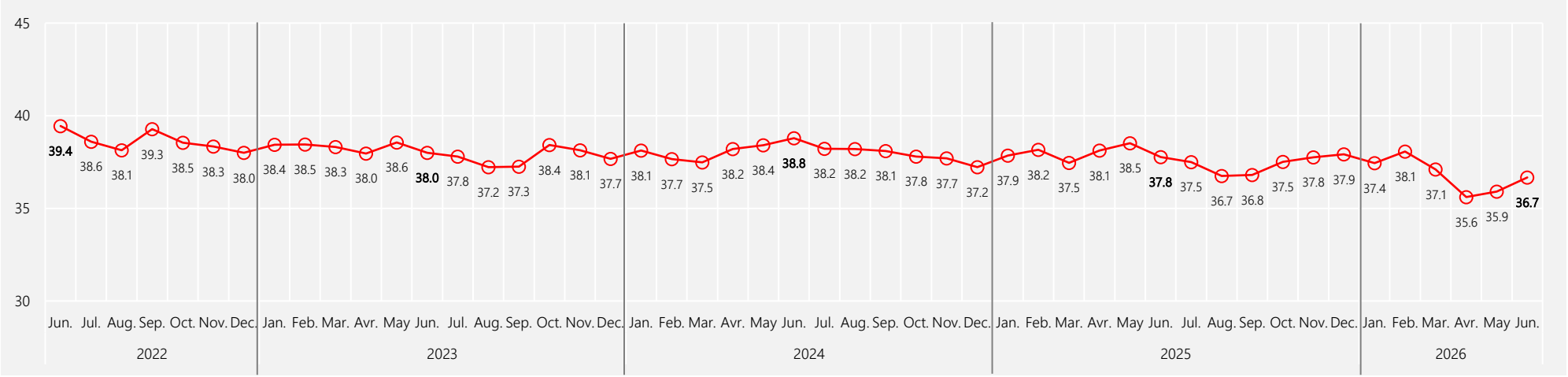
Source: Agcom elaboration on Audicom data

* Unique digital users
**Google (Alphabet). Meta Platform. Amazon. Microsoft. Poste Italiane are detected only through the *Audicom Digital Panel*.

2.13 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

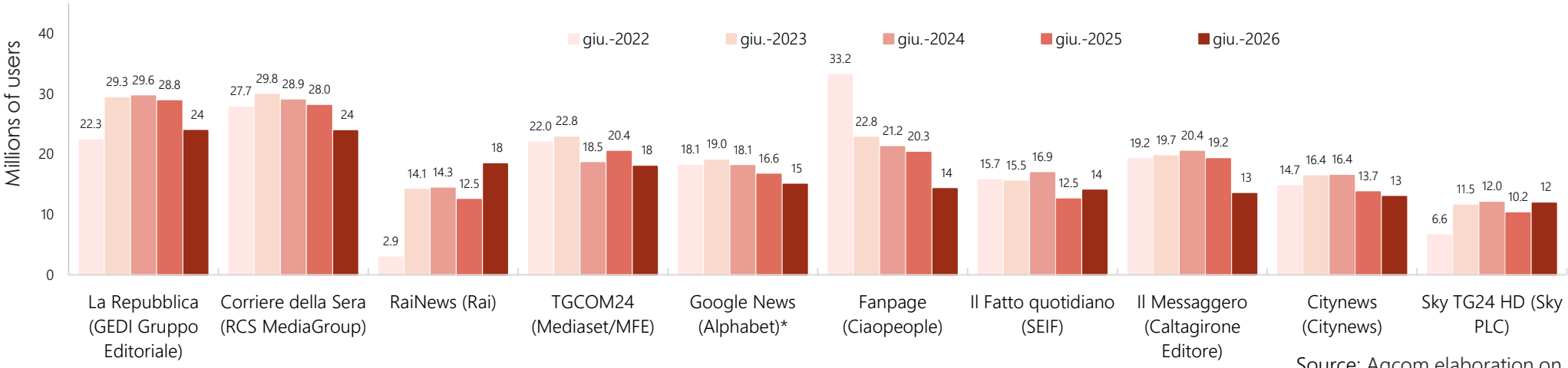
(June 2022 – June 2026)



36 millions and **665** thousands unique users logged on to the generalist news sites/APPs in June 2026 (**-1.1** million users compared to June 2025)

More than **48 minutes** spent on average by each user browsing general news websites/APPs in June 2026

UNIQUE USERS OF THE MAIN WEBSITES



Unique digital users: number of distinct individuals who visited a content of a website or application during the reference period. Users who visited a website or application multiple times during the same period are counted only once.

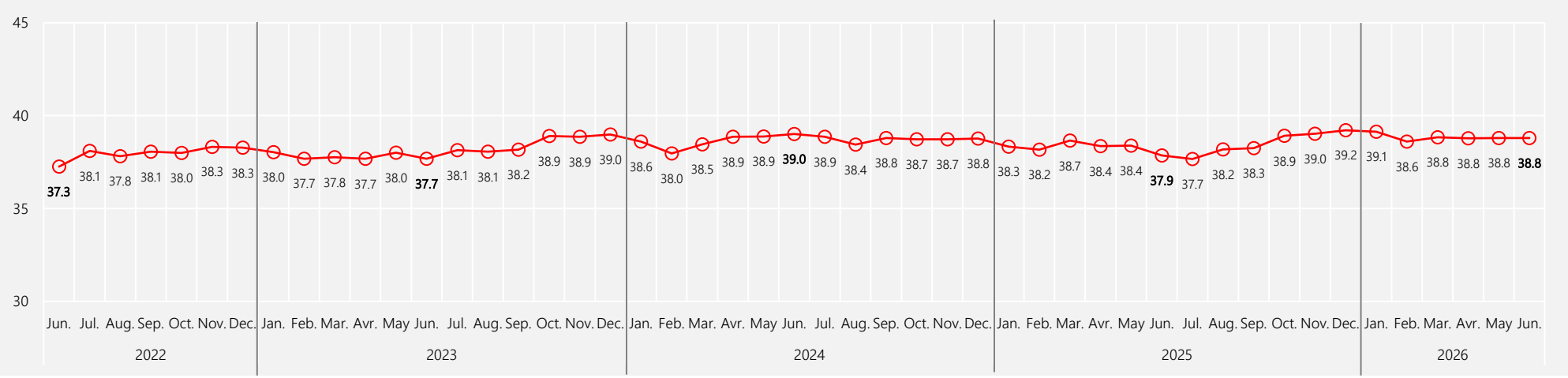
Source: Agcom elaboration on Audicom data
(Values referring to the sub-category: «Current Event & Global News»)

*Google News and Citynews are detected only through the *Audicom Digital Panel*.

2.14 PLATFORMS: E-COMMERCE WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

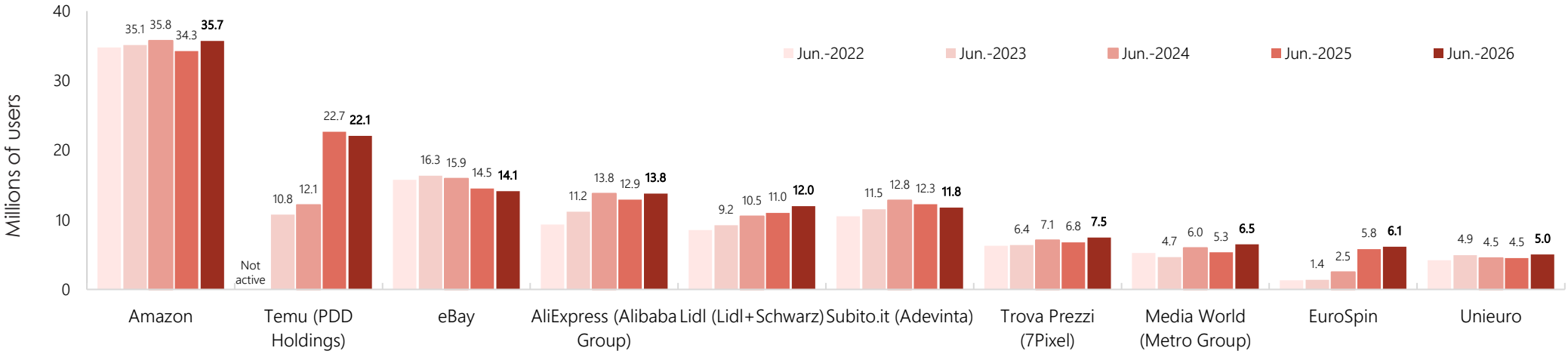
(June 2022 – June 2026)



38 millions and **797** thousands unique users logged on to e-commerce sites/APPs in June 2026 (+**936** thousands of users compared to June 2025)

2 hours and **12** minutes spent on average by each user browsing e-commerce websites/APPs in June 2026

UNIQUE USERS OF THE MAIN WEBSITES*



Unique digital users: number of distinct individuals who visited a content of a website or application during the reference period. Users who visited a website or application multiple times during the same period are counted only once.

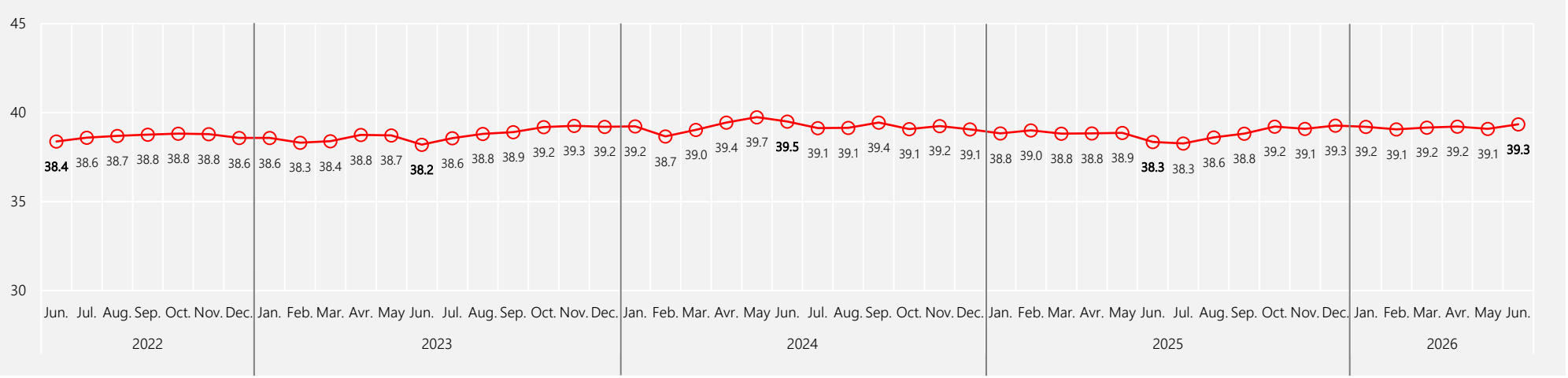
Source: Agcom elaboration on Audicom data *(Values referring to the category: «Multi-category Commerce»)*

* The brands represented are dectected only through the Audicom Digital Panel.

2.15 PLATFORMS: SOCIAL NETWORK WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

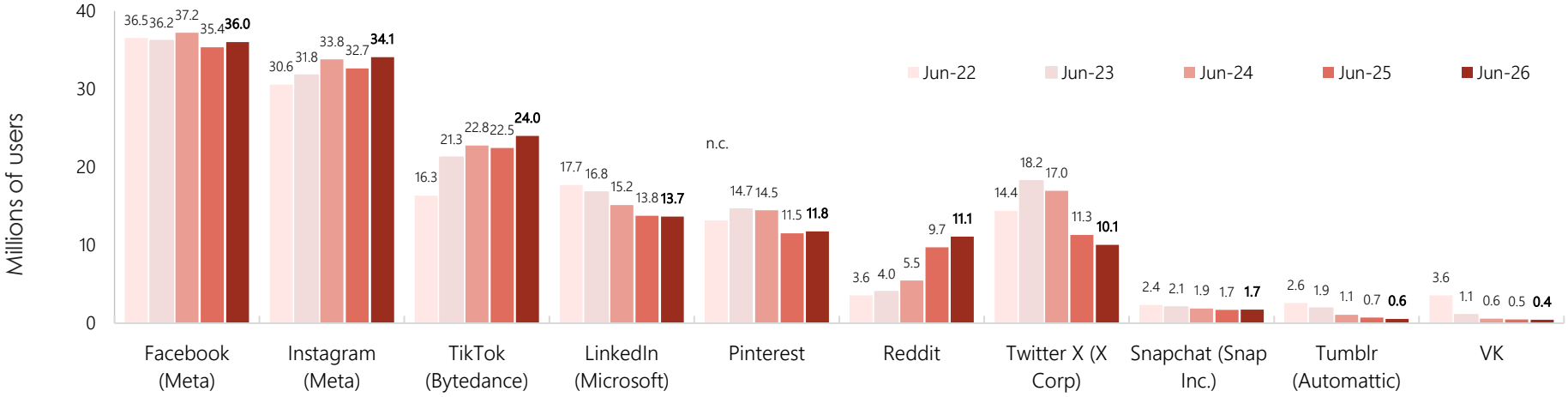
(June 2022 – June 2026)



39 millions and **336** thousands unique users logged on to social networking and member communities sites/APPs in June 2026 (**+987** thousands users compared to June 2025)

23 hours and **36** minutes spent on average by each user browsing social networking websites/APPs in June 2026

UNIQUE USERS OF THE MAIN WEBSITES*



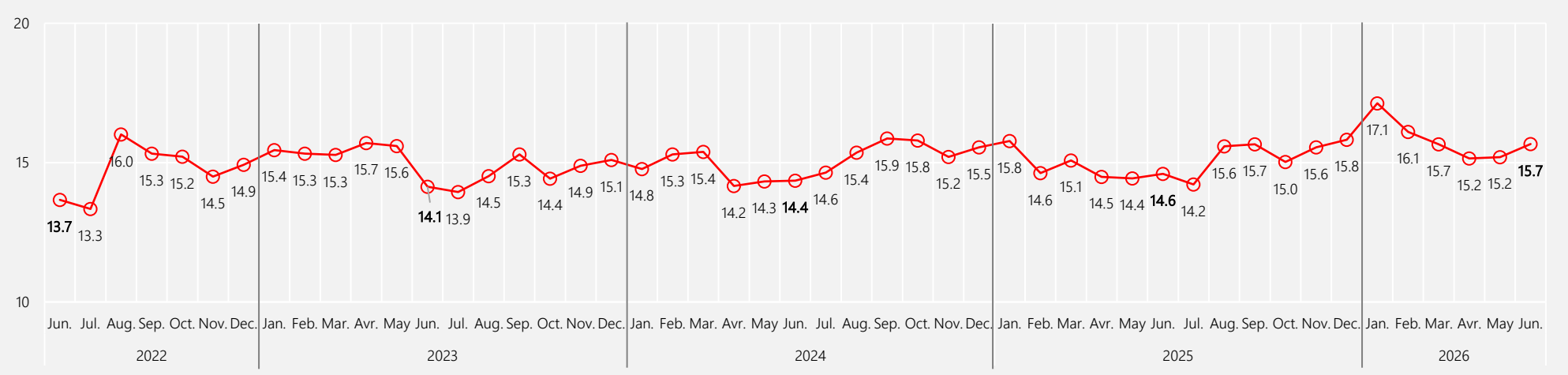
* The chart presents the unique users of the top 10 Brands within the "Social Network and Member Communities" sub-category that provide Social Networking services in Italy.

Unique digital users: number of distinct individuals who visited a content of a website or application during the reference period. Users who visited a website or application multiple times during the same period are counted only once.

Source: Agcom elaboration on Audicom data *(Values referring to the category: « Social network and Member Communities»)*

2.16 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

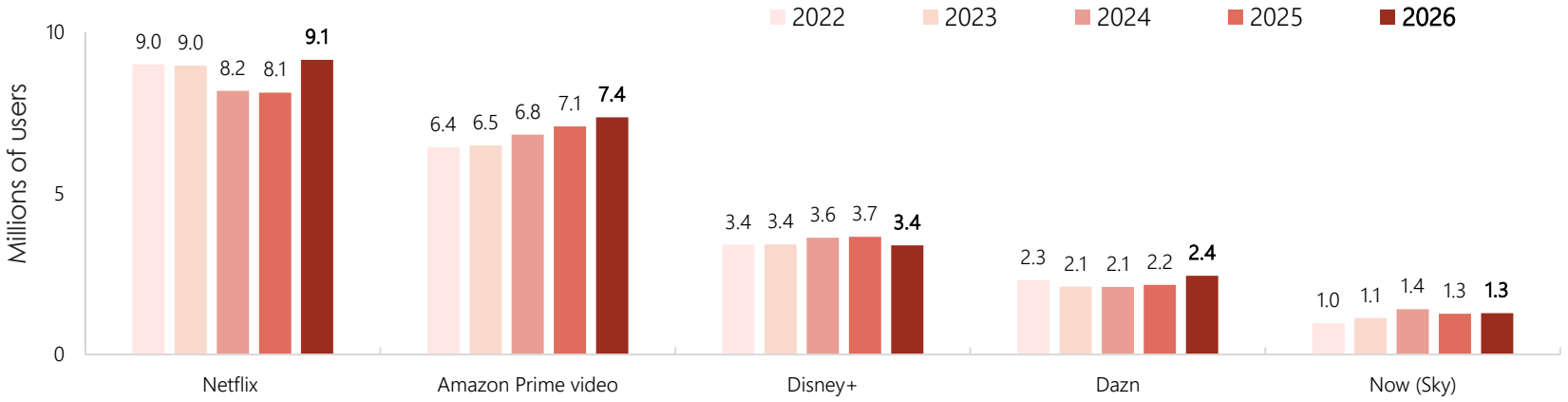
UNIQUE USERS IN MILLIONS (June 2022 – June 2026)



15 millions and **663** thousands of unique users logged on to video-on-demand sites/APPs in June 2026 (**+1** million compared to June 2025)

Unique users: number of different users/people who visited any content of a website. category. channel or application during the reporting period. Users who accessed the content more than once during the period in question are counted only once.

UNIQUE USERS OF THE MAIN PLATFORMS* (average since the beginning of the year)



* Note: leading operators by average unique users

Source: Agcom elaboration on Comscore data

The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy: Alphabet/Google (Google Play Movies &TV); Amazon (Primevideo.com Sept. 20 - Jul. 23; Amazon Streaming since Aug. 23); Apple (Apple TV); Chili (CHILI.COM); Comcast/Sky (NOWTV.IT); Dazn (DAZN.COM); Netflix (Netflix Inc.); Rakuten Group (RAKUTEN.TV); The Walt Disney (Disney Digital); TIM (TIMVISION.IT).

Mediaset Infinity data are not considered due to an editorial choice which does not allow to separate the part of the paid services from the free one.

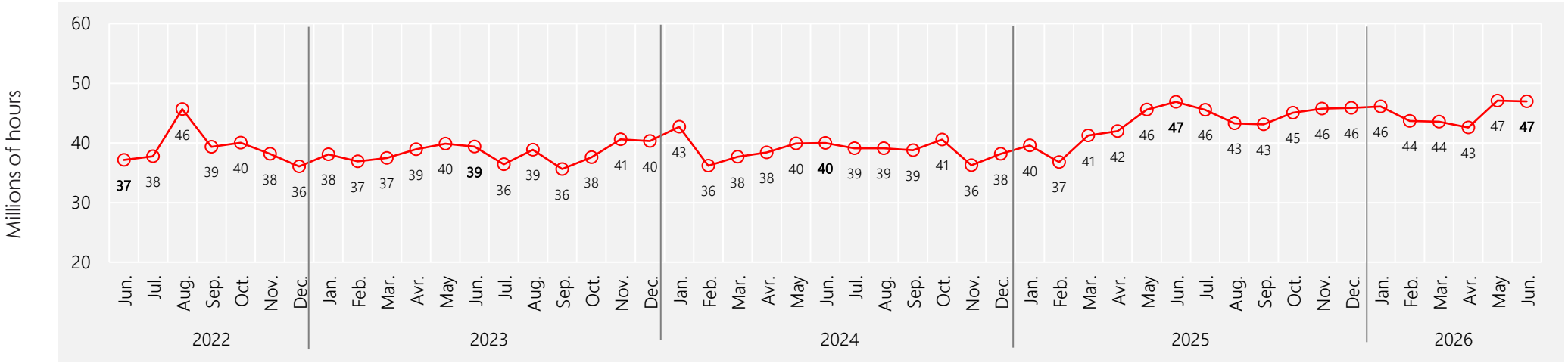
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV Dazn data are collected by Auditel as of August 2022. according to AGCOM resolution no. 18/22/CONS

Sono rappresentati I principali operatori per utenti unici medi

2.17 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT

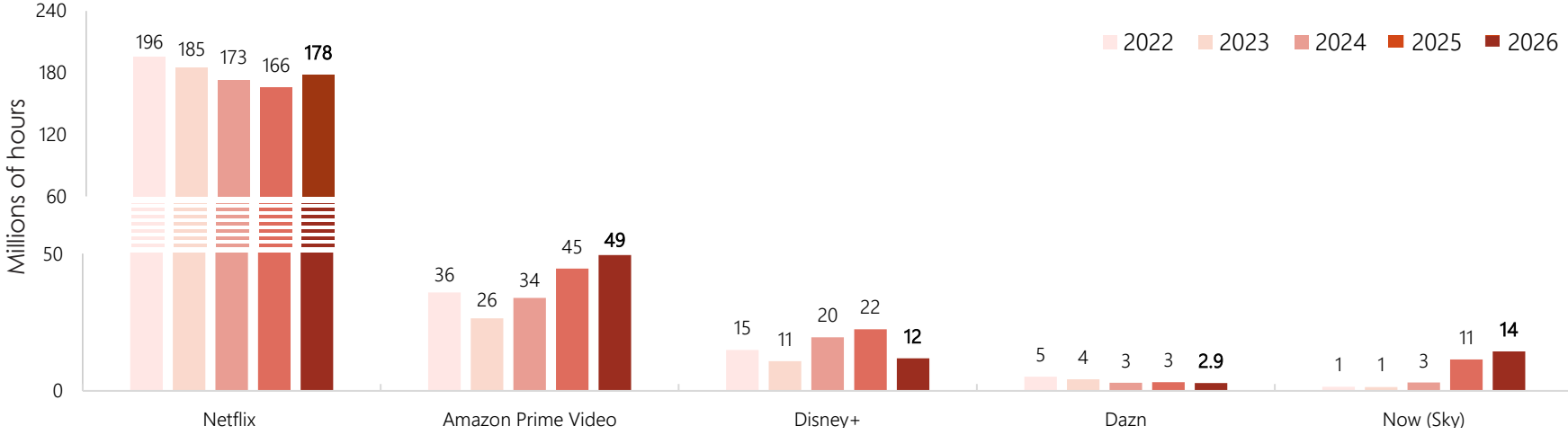
(June 2022 – June 2026)



Time spent on paid video on demand service sites/APPs is nearly **47 millions** hours in June 2026.

The average time spent by each visitor on pay video on demand platforms is **3 hours** in June 2026.

MAIN PLATFORMS – TOTAL HOURS SPENT SINCE THE BEGINNING OF THE YEAR*



***** Note: total hours spent for the top 5 operators ranked by unique users (slide 2.16).

Source: Agcom elaboration on ComScore data

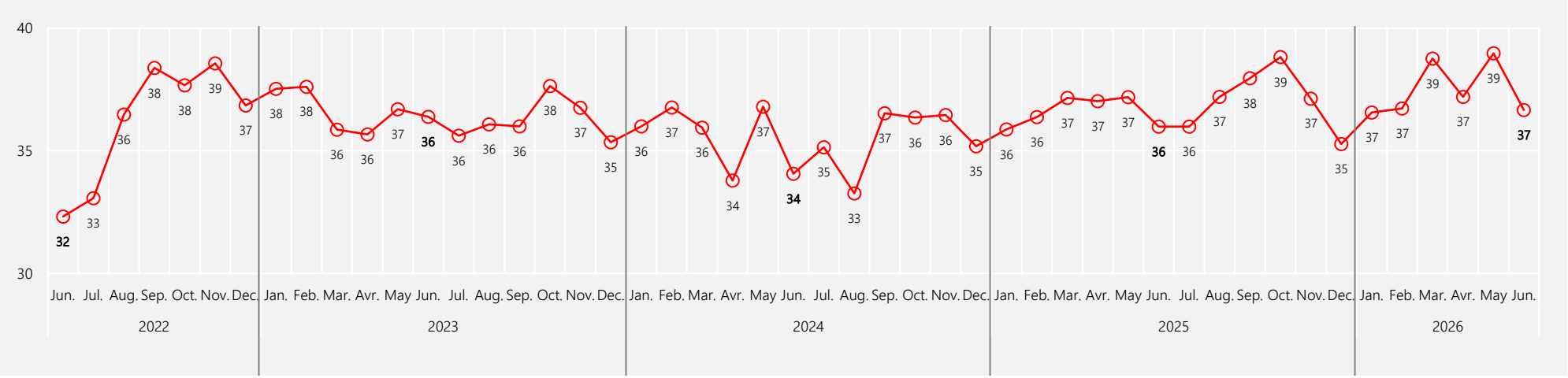
The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy: Alphabet/Google (Google Play Movies &TV); Amazon (Primevideo.com Sept. 20 - Jul. 23; Amazon Streaming since Aug. 23); Apple (Apple TV); Chili (CHILI.COM); Comcast/Sky (NOWTV.IT); Dazn (DAZN.COM); Netflix (Netflix Inc.); Rakuten Group (RAKUTEN.TV); The Walt Disney (Disney Digital); TIM (TIMVISION.IT).

Mediaset Infinity data are not considered due to an editorial choice which does not allow to separate the part of the paid services from the free one.

The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

2.18 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS

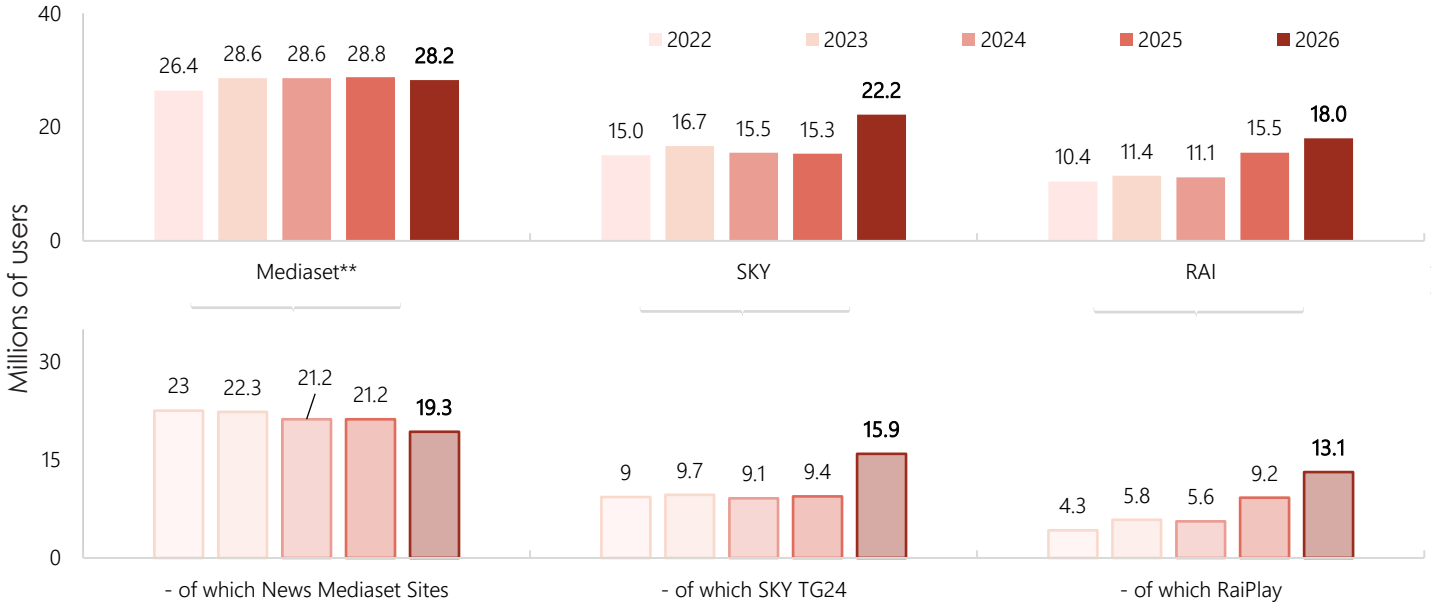
UNIQUE USERS IN MILLIONS (June 2022 – June 2026)



36 millions and **666** thousands unique users logged on to free video-on-demand sites/APPs in June 2026 (**+680** thousands compared to une 2025).

Unique users: number of different users/people who visited any content of a website. category. channel or application during the reporting period. Users who accessed the content more than once during the period in question are counted only once.

UNIQUE USERS OF THE MAIN PLATFORMS* (average since the beginning of the year)



The leading operators by unique users are reported. together with their most relevant free-to-access news. sports and entertainment services. ranked by unique users

*** The total hours for MFE/Mediaset refer to the Mediaset.it Sites websites and apps. which. due to editorial decisions. do not allow for the separation of traffic from paid VOD services included within Mediaset Infinity Sites. Since the start of 2026. this segment has averaged approximately 17 million and 248 thousands users*

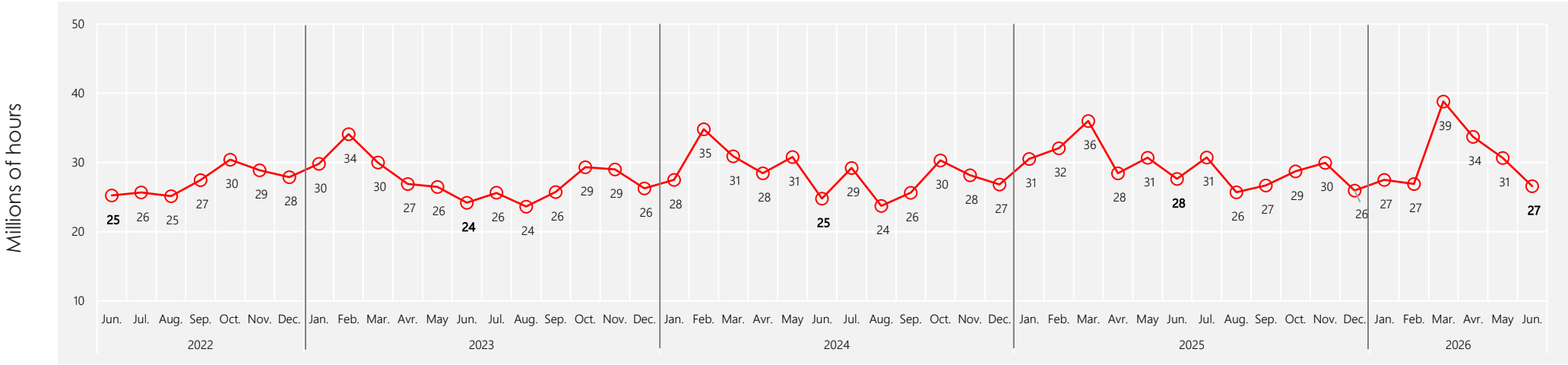
The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: MFE/Mediaset (Mediaset Infinity Sites and TGCOM 24 Sites Jan. 20 - Avr. 22; Mediaset.it Sites since May 22); Rai (RaiPlay; Rai News. Rai Sport); Warner Bros. Discovery (Discovery Inc. Sept. 20 – May 23; Warner (TBS Entertainment Digital. until May 23. Warner Bros. Discovery since Sept. 23); Comcast/Sky (Sky Free ToAir; Sky sport; Sky TG24. Sky Entertainment); Cairo Communication/La 7 (La7); Paramount Global/Viacom (Nickelodeon Kids and Family; MTV Italy); Rakuten Group (VIKI.COM); De Agostini (DEABYDAY.TV; DEAKIDS.IT); Mperience (VVVVID.IT); A&E Television Networks Italy (A+E Networks Digital); Italia Sport Communication (SPORTITALIA.COM); Rete Blu (TV2000.IT); Delta Pictures (POPCORNTV.IT); Fascino PGT (WITTYTV.IT).

Please note that due to editorial choices for some sites and applications (Mediaset Infinity Sites; Warner Bros. Discovery) it is not possible to unbundle the paid VOD portion.

Source: Agcom elaboration on ComScore data

2.19 PLATFORMS: TIME SPENT ON FREE VIDEO ON DEMAND PLATFORMS

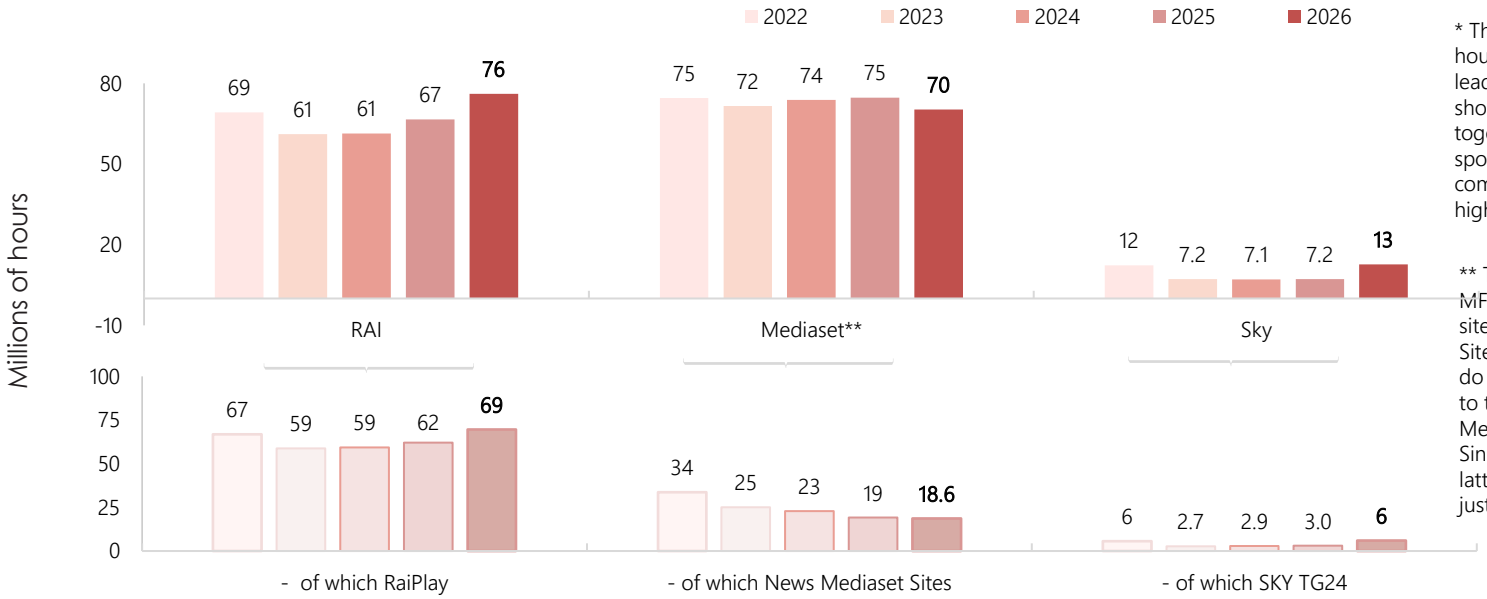
TOTAL HOURS SPENT (June 2022 – June 2026)



Time spent on free video on demand service sites/APPs was about **26.6** millions of hours in June 2026.

The average time spent per month by each visitor on free video on demand platforms is about **43** minutes in June 2026.

MAIN PLATFORMS – TOTAL HOURS SPENT SINCE THE BEGINNING OF THE YEAR* (in millions)



* The chart presents the total hours of use recorded by the leading operators by unique users shown in the previous slide. together with their free news. sport and entertainment components generating the highest number of hours

** The total hours reported for MFE/Mediaset refer to the sites/apps included in Mediaset.it Sites which. due to editorial choices. do not allow the traffic attributable to the paid VOD services included in Mediaset Infinity Sites to be isolated. Since the beginning of 2026. this latter component has amounted to just over 22 million hours

The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: Mediaset (Mediaset Infinity Sites and TGCOM 24 Sites Jan.19 - Spr.22; Mediaset.it Sites since May 22). Rai (RaiPlay; Rai News. Rai Sport). Discovery (Discovery Inc). Sky (Cielotv.it. TV8 Sites. Sky.it Sprt HD. Sky.it TG24 HD. Sky.it Uno HD gen.19-apr.19; Sky Free ToAir; Sky sport; Sky TG24. Sky Entertainment mag.19 - giu.22). Cairo/La 7 (La7). Paramount/Viacom (Nickelodeon Kids and Family; MTV Italy). Rakuten (VIKI.COM). Warner (TBS Entertainment Digital). De Agostini (DEABYDAY.TV; DEAKIDS.IT). VVVVID.IT; A+E Networks Digital; SPORTITALIA.COM; TV2000.IT; POPCORNTV.IT; WITTYTV.IT.

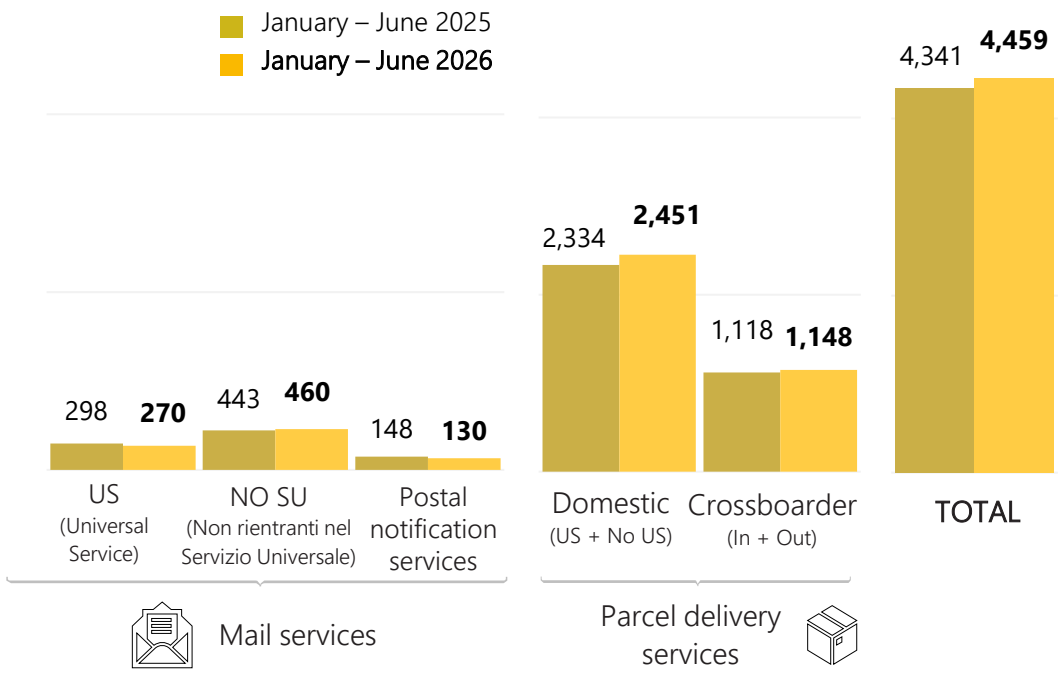
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV.

Source: Agcom elaboration on ComScore data

3.1 POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



-3.1

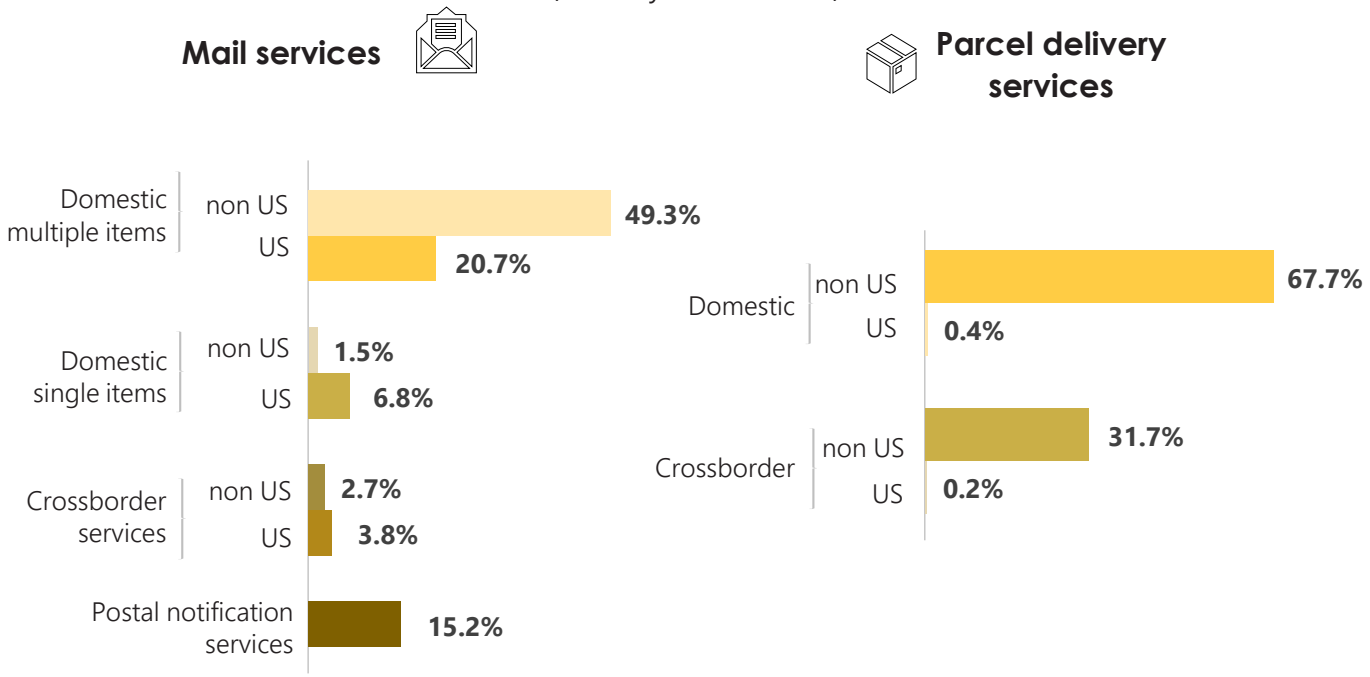
+4.2

+2.7 Total

Annual change in %
(Jan. - Jun. 2025) – (Jan. – Jun. 2026)

REVENUES BY SOURCE TYPE SINCE THE BEGINNING OF THE YEAR (%)

(January - June 2026)



Annual change in %
(Jan. - Jun. 2025 – Jan. - Jun. 2026)

+1.2 Domestic multiple items

-9.0 Domestic single items

-15.9 Crossborder services

-11.8 Postal notification services

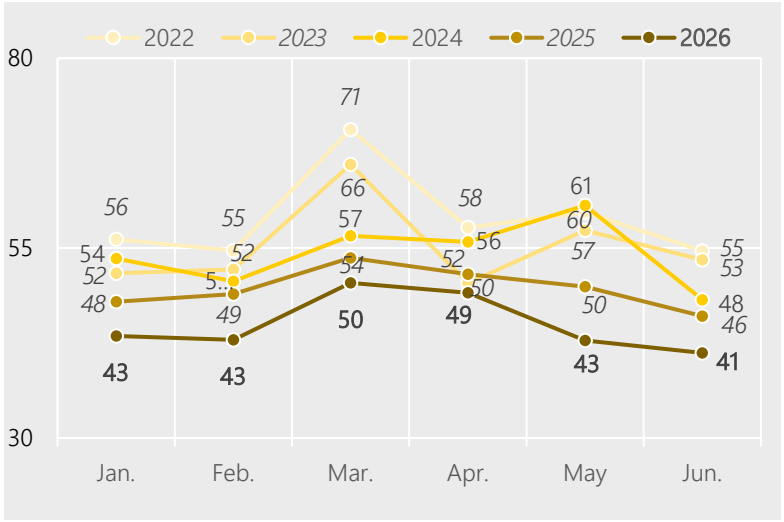
+5.0 Domestic

+2.6 Crossborder

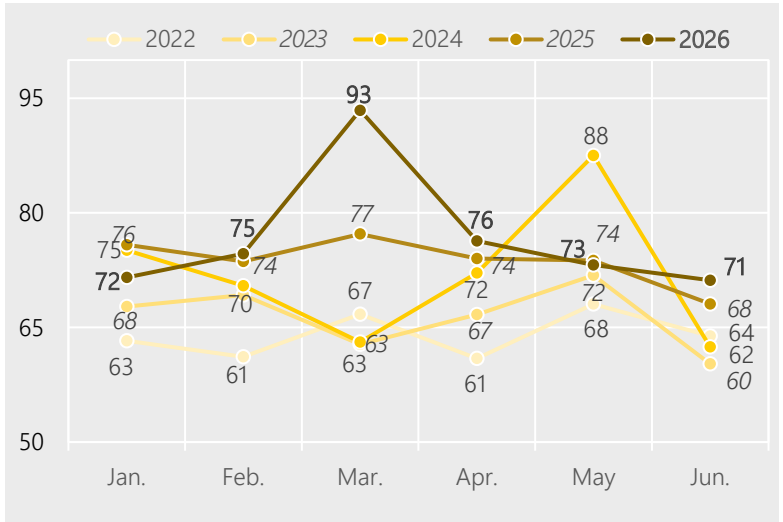
Note: due to corporate reclassifications and methodological updates by the Authority, current values are not comparable with previous report editions. Specifically, starting June 2026, the sample has been expanded to include the following operators: Amazon Italia Transport S.r.l., Asendia Italia S.r.l., BRT S.p.A., CRC Post S.r.l., DHL Express (Italy) S.r.l., F.lli Liccardi S.r.l., FEDEX Express Italy S.r.l., Fulmine Group S.p.A., GLS Italy S.p.A., HR Parcel S.p.A., Integraa Holding S.r.l., KPM S.r.l., Locker Inpost Italia S.r.l., Poste Italiane S.p.A., Sailpost S.p.A., Schenker Italiana S.p.A., SDA Express Courier S.p.A., Spike Rete Soggetto e United Parcel Service Italia S.r.l

3.2 POSTAL SERVICES: MONTHLY MAIL SERVICES REVENUES

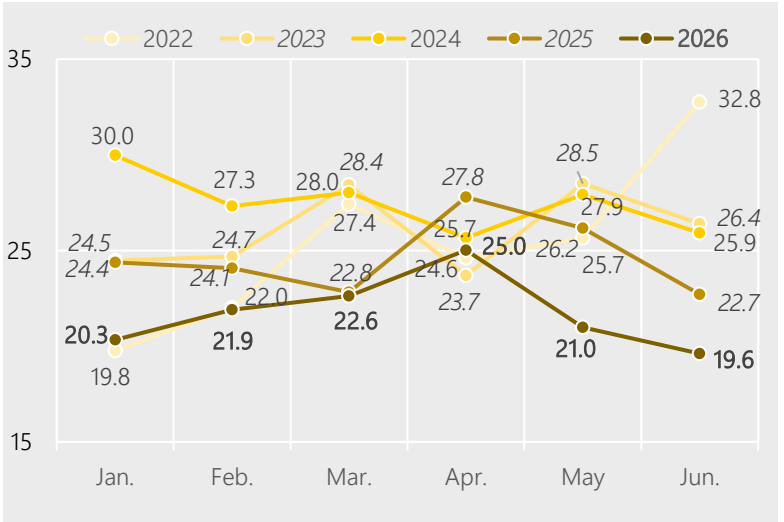
UNIVERSAL SERVICE (US)



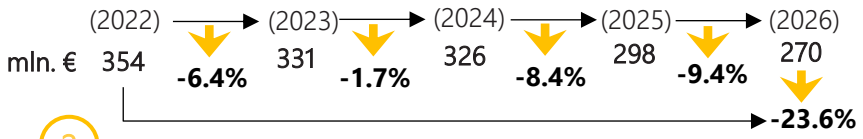
OTHER SERVICES (NON US)

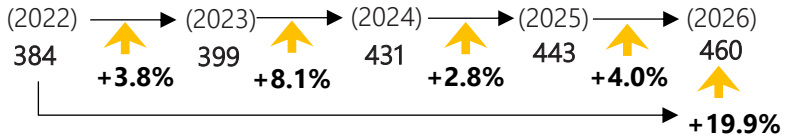


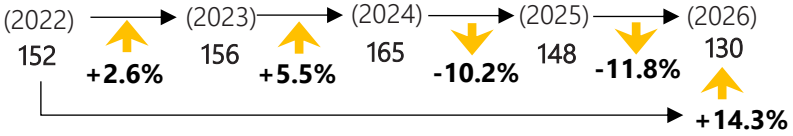
POSTAL NOTIFICATION SERVICES



1 **Cumulative values since the beginning of the year** (Jan. – Jun.)







2 **Monthly comparison (change in %)**

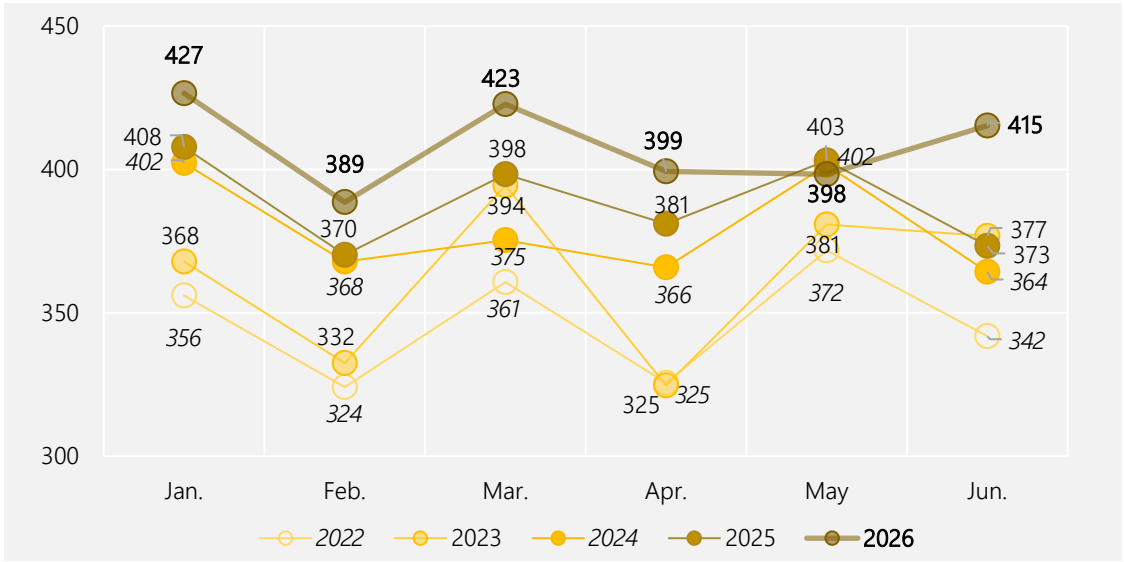
	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	-8.0	+3.8	-10.7	-9.4	-22.7
February	-4.5	-3.0	-3.3	-12.3	-21.5
March	-6.5	-14.2	-5.1	-6.1	-28.6
Avril	-12.7	+10.7	-7.6	-4.7	-14.9
May	-4.0	+5.7	-17.7	-14.1	-28.3
June	-2.2	-9.8	-4.5	-10.5	-24.6

	Annuale				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+7.0	+10.9	+1.0	-5.6	+13.1
February	+13.2	+1.7	+4.5	+1.4	+22.1
March	-5.9	+0.5	+22.4	+21.0	+40.0
Avril	+9.4	+8.1	+2.7	+3.1	+25.2
May	+5.5	+21.8	-15.7	-0.8	+7.5
June	-5.7	+3.7	+9.0	+4.5	+11.4

	Annuale				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+23.8	+22.5	-18.7	-16.6	+2.8
February	+12.1	+10.8	-11.9	-9.0	-0.4
March	+3.6	-1.4	-18.6	-0.9	-17.6
Avril	-3.7	+8.3	+8.3	-10.0	+1.6
May	+11.1	-2.0	-6.3	-19.8	-18.2
June	-19.4	-1.8	-12.4	-13.6	-40.1

3.3 POSTAL SERVICES: MONTHLY PARCEL SERVICES REVENUES (DOMESTIC/CROSSBORDER)

DOMESTIC



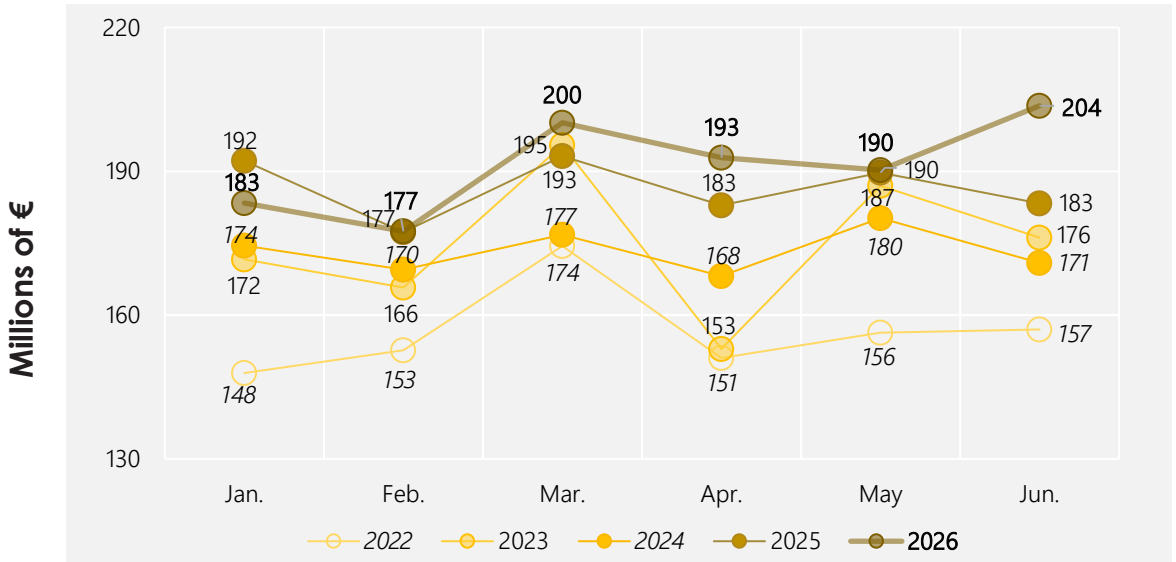
1 **Cumulative values since the beginning of the year** (Jan. – Jun.)

	(2022)		(2023)		(2024)		(2025)		(2026)
mln. €	2,080	+4,7%	2,177	+4.6%	2,277	+2.5%	2,334	+5.0%	2,451
									+17.8%

2 **Monthly comparison (change in %)**

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+3.3	+9.4	+1.4	+4.6	+19.8
February	+2.6	+10.6	+0.6	+5.0	+19.9
March	+9.3	-4.8	+6.1	+6.1	+17.2
Avril	-0.3	+12.7	+4.1	+4.8	+22.7
May	+2.4	+5.5	+0.4	-1.2	+7.2
June	+10.2	-3.3	+2.5	+11.2	+21.5

CROSSBORDER



1 **Cumulative values since the beginning of the year** (Jan. – Jun.)

	(2022)		(2023)		(2024)		(2025)		(2026)
mln. €	939	+11.7%	1,049	-0.8%	1,040	+7,5%	1,118	+2.6%	1,148
									+22.2%

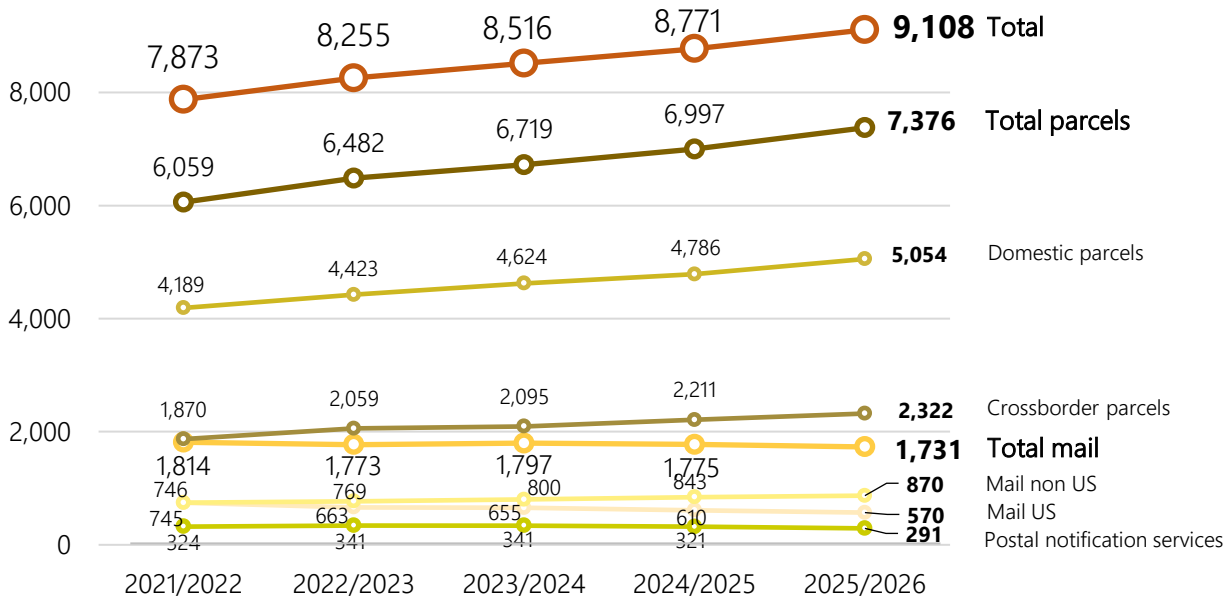
2 **Quarterly comparison (change in %)**

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+16.0	+1.7	+10.1	-4.6	+24.0
February	+8.6	+2.3	+4.6	+0.1	+16.3
March	+12.1	-9.6	+9.3	+3.6	+14.8
Avril	+1.3	+9.9	+8.8	+5.4	+27.7
May	+19.6	-3.6	+5.3	+0.3	+21.7
June	+12.2	-3.0	+7.3	+11.1	+29.8

3.4 POSTAL SERVICES: REVENUES HISTORICAL TRENDS

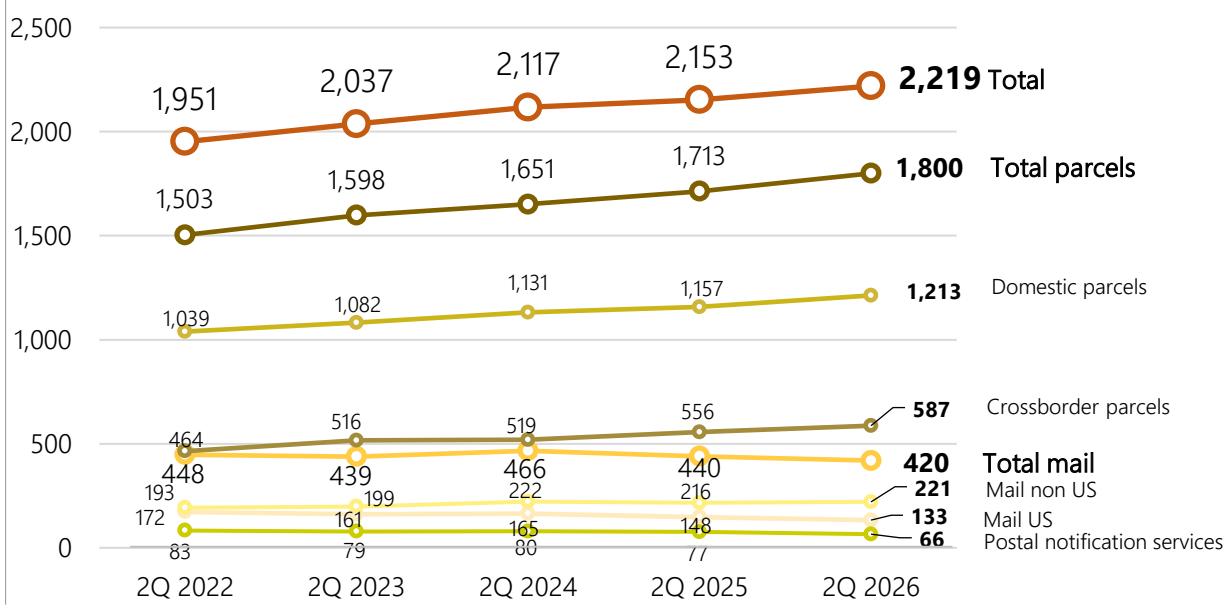
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



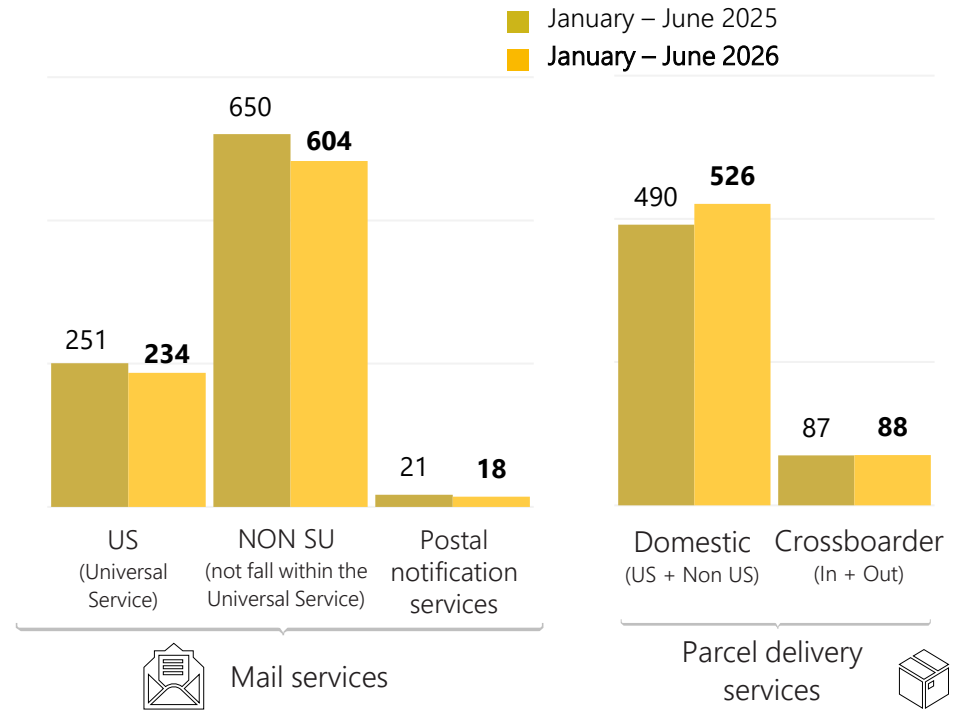
	Change in % (2021/22 – 2025/26)		Change in % (2024/25 – 2025/26)	
Total:	**+15.7**	↑	**+3.8**	↑
Mail services:	**-4.5**	↓	**-2.4**	↓
- Universal Service:	-23.4	↓	-6.6	↓
- No Universal Service:	+16.7	↑	+3.2	↑
- Postal notification services:	-10.0	↓	-9.2	↓
Parcel delivery services:	**+21.7**	↑	**+5.4**	↑
- Domestic:	+20.7	↑	+5.6	↑
- Crossborder:	+24.2	↑	+5.0	↑

	Change in % (Q2 2022 – Q2 2026)		Change in % (Q2 2025 – Q2 2026)	
Total:	**+13.7**	↑	**+3.1**	↑
Mail services:	**-6.4**	↓	**-4.7**	↓
- Universal Service:	-22.6	↓	-9.7	↓
- No Universal Service:	+14.4	↑	+2.2	↑
- Postal notification services:	-21.0	↓	-14.4	↓
Parcel delivery services:	**+19.7**	↑	**+5.0**	↑
- Domestic:	+16.7	↑	+4.8	↑
- Crossborder:	+26.4	↑	+5.6	↑

3.5 POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

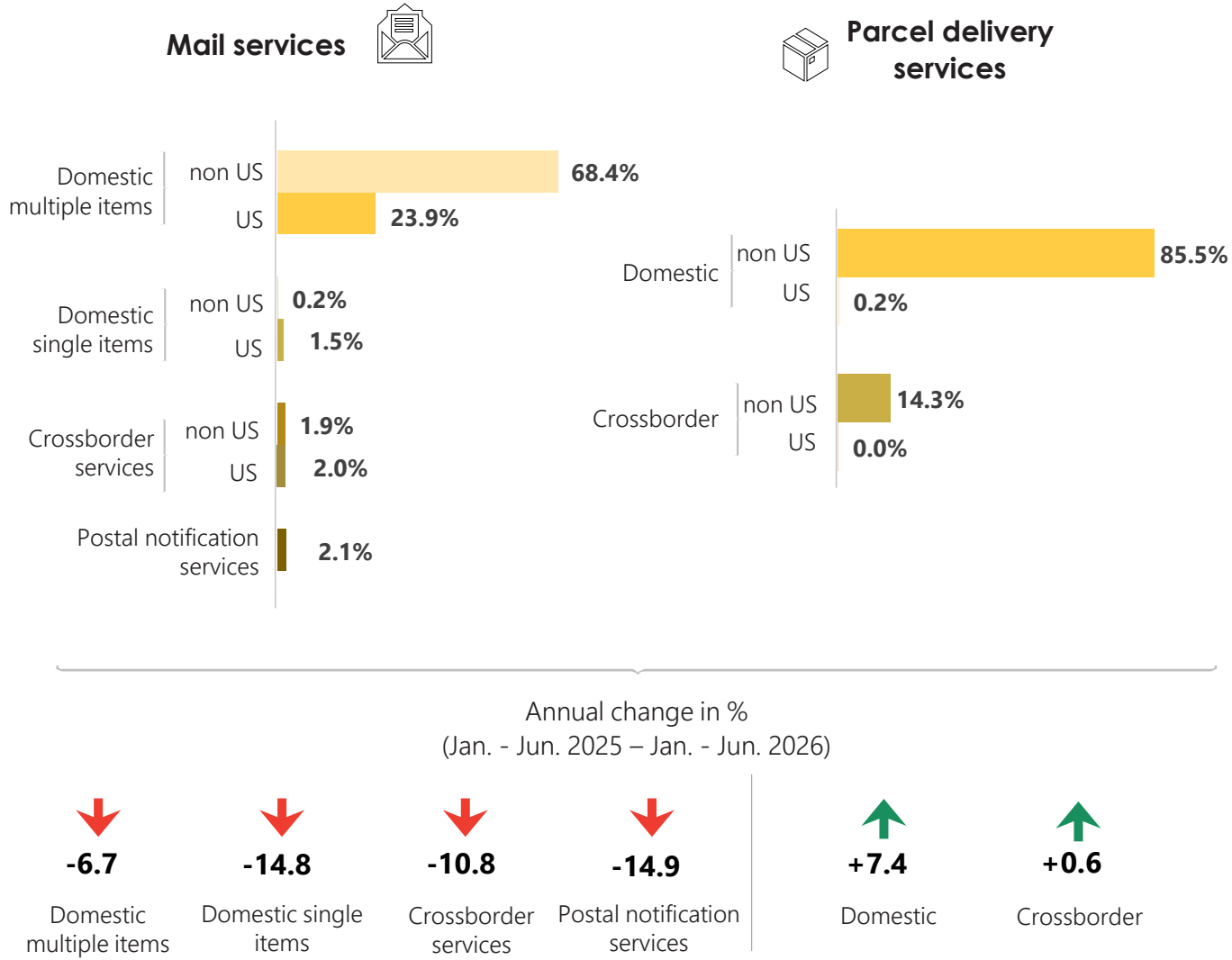
MILLIONS OF UNITS





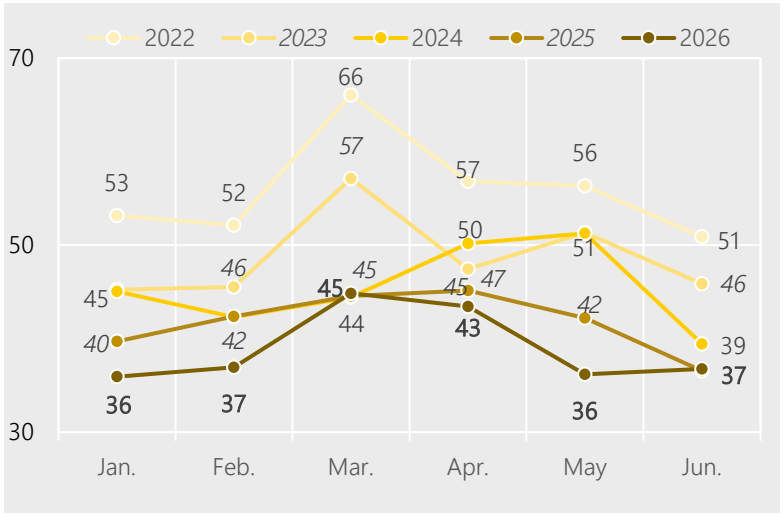
VOLUMES BY SOURCE TYPE (%)

(January – June 2025)

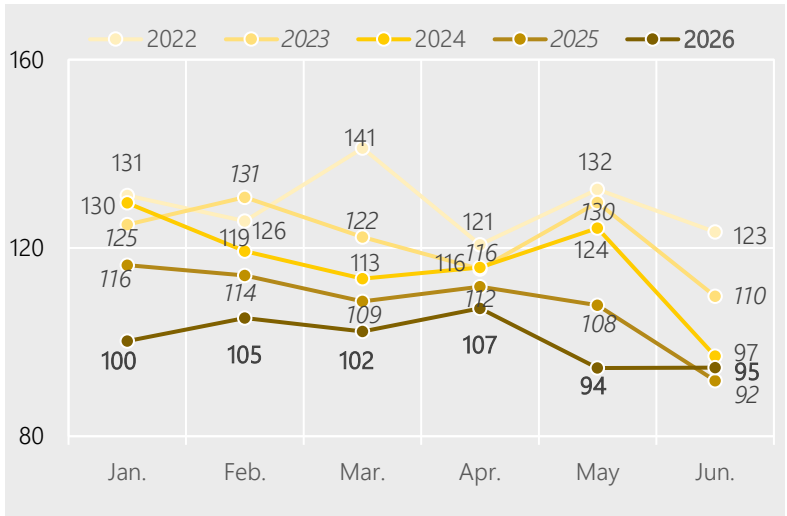


3.6 POSTAL SERVICES: MONTHLY MAIL SERVICES VOLUMES (US/NO US)

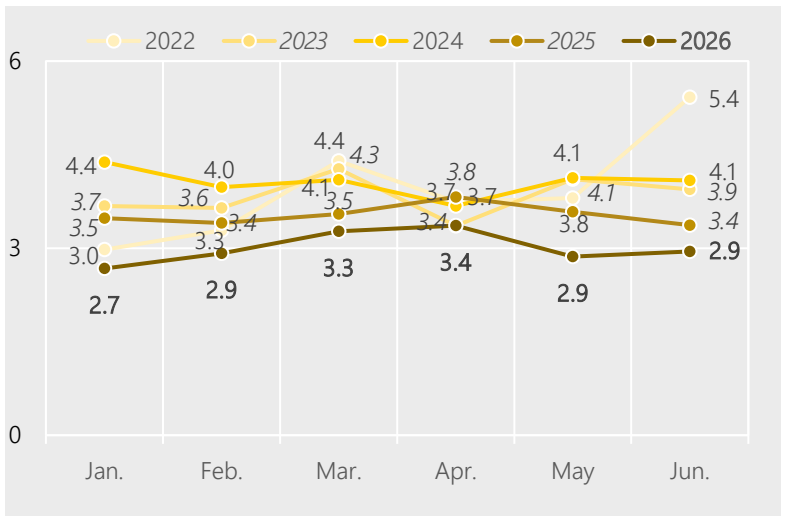
UNIVERSAL SERVICE (US)



OTHER SERVICES (NON US)



POSTAL NOTIFICATION SERVICES



1 **Cumulative values since the beginning of the year** (Jan. – Jun.)

mln. of items

	(2022)	(2023)	(2024)	(2025)	(2026)
UNIVERSAL SERVICE (US)	335	293 (-12.8%)	273 (-6.8%)	251 (-8.1%)	234 (-6.6%)
					-30.2%
OTHER SERVICES (NON US)	775	733 (-5.4%)	699 (-4.6%)	650 (-7.0%)	604 (-7.2%)
					-22.1%
POSTAL NOTIFICATION SERVICES	23.6	23.0 (-2.6%)	24.3 (+5.8%)	21.2 (-12.9%)	18.0 (-14.9%)
					-23.7%

2 **Monthly comparison (change in %)**

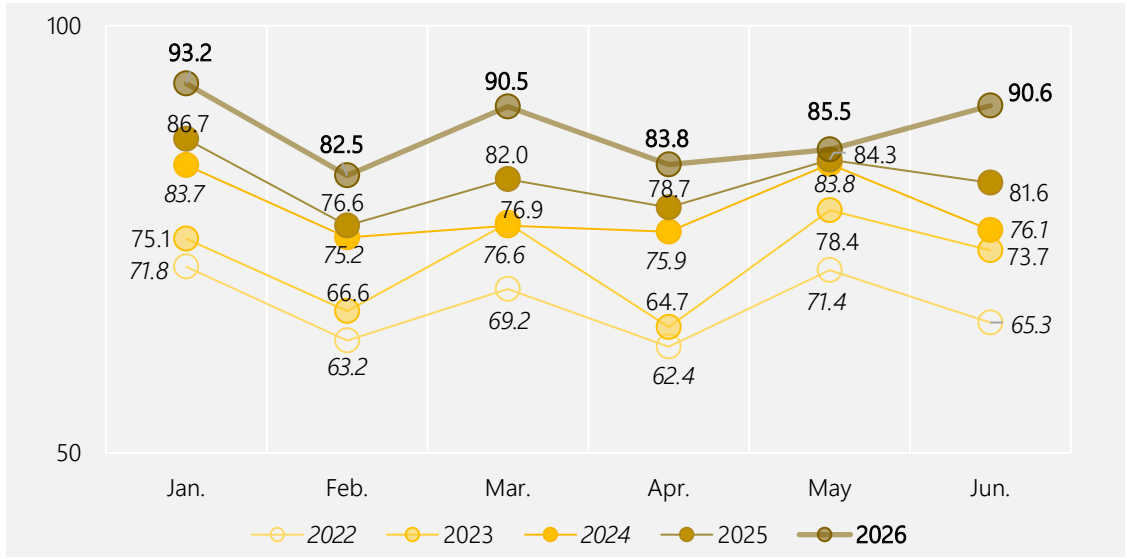
	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	-14.9	-0.5	-11.9	-9.5	-32.4
February	-12.7	-7.0	+0.2	-12.8	-29.1
March	-13.5	-22.2	+0.3	+0.6	-32.1
Avril	-16.5	5.7	-10.0	-3.8	-23.6
May	-8.9	-0.2	-17.7	-14.3	-35.8
June	-9.9	-14.0	-7.3	+0.6	-27.7

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	-4.7	+3.7	-10.2	-13.9	-23.6
February	+4.0	-8.8	-4.3	-8.0	-16.4
March	-13.4	-7.2	-4.3	-5.9	-27.6
Avril	-4.3	+0.3	-3.5	-4.1	-11.2
May	-2.1	-4.2	-13.2	-12.4	-28.7
June	-11.1	-11.6	-5.4	+3.0	-23.4

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+23.5	+19.2	-20.6	-23.2	-10.2
February	+11.0	+9.1	-14.5	-14.2	-11.2
March	-2.9	-4.1	-13.4	-7.8	-25.7
Avril	-10.2	+9.5	+3.9	-12.0	-10.1
May	+8.0	+0.5	-13.2	-20.1	-24.7
June	-27.3	3.7	-17.6	-12.6	-45.7

3.7 POSTAL SERVICES: MONTHLY PARCEL SERVICES VOLUMES (DOMESTIC/CROSSBORDER)

DOMESTIC



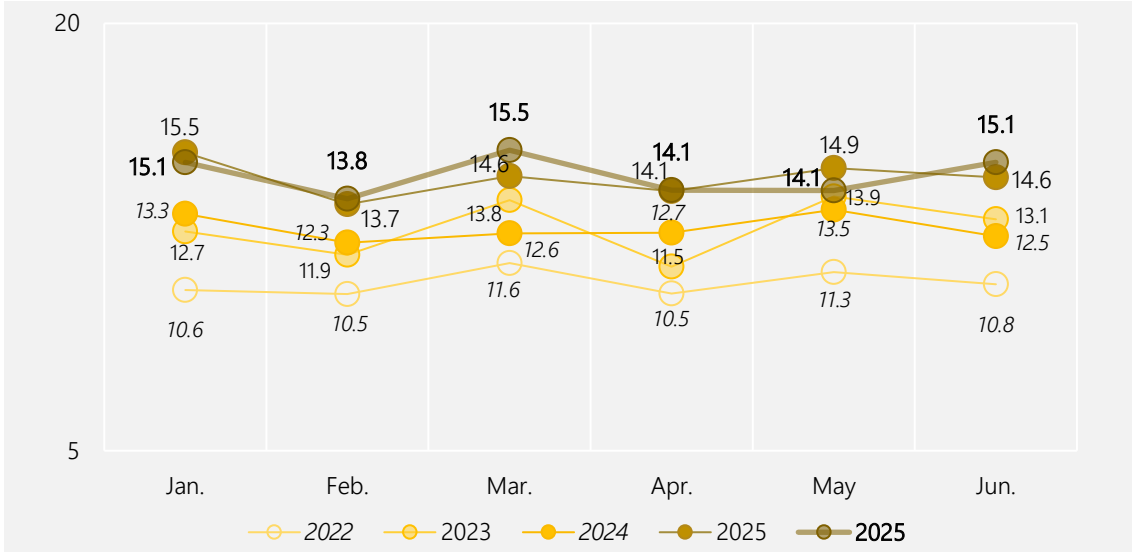
1 **Cumulative values since the beginning of the year** (Jan. – Jun.)

mln. of items	(2022)		(2023)		(2024)		(2025)		(2026)
	403	+8.0%	435	+8.2%	471	+4.0%	490	+7.4%	526
								+30.5%	

2 **Quarterly comparison (change in %)**

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
January	+4.6	+11.5	+3.7	+7.5	+29.8
February	+5.4	+12.9	+1.9	+7.6	+30.6
March	+11.1	-0.4	+7.1	+10.4	+30.9
Avril	+3.7	+17.2	+3.7	+6.4	+34.1
May	+9.8	+6.9	+0.6	+1.4	+19.8
June	+13.0	+3.2	+7.3	+11.0	+38.9

CROSSBORDER



1 **Cumulative values since the beginning of the year** (Jan. – Jun.)

mln. of items	(2022)		(2023)		(2024)		(2025)		(2026)
	65.4	+17.6%	76.9	=	76.9	+13.6%	87.4	+0.6%	87.9
								+34.5%	

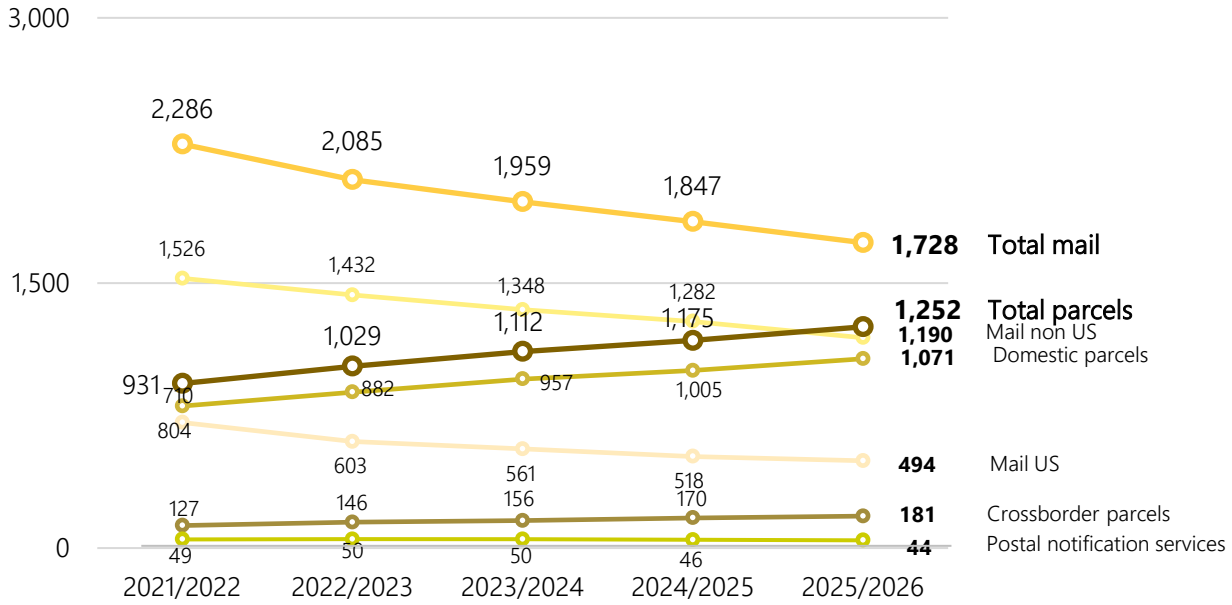
2 **Quarterly comparison (change in %)**

	YoY				Whole period
	2022/2023	2023/2024	2024/2025	2025/2026	2022/2026
Gennaio	+19.3	+4.9	+16.1	-2.2	+42.2
Febbraio	+13.1	+3.6	+11.0	+1.4	+31.9
Marzo	+19.1	-8.5	+15.9	+6.2	+34.2
Aprile	+8.9	+10.4	+11.5	+0.3	+34.5
Maggio	+23.5	-3.3	+10.8	-5.3	+25.3
Giugno	+21.1	-4.5	+16.4	+3.6	+39.5

3.8 POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

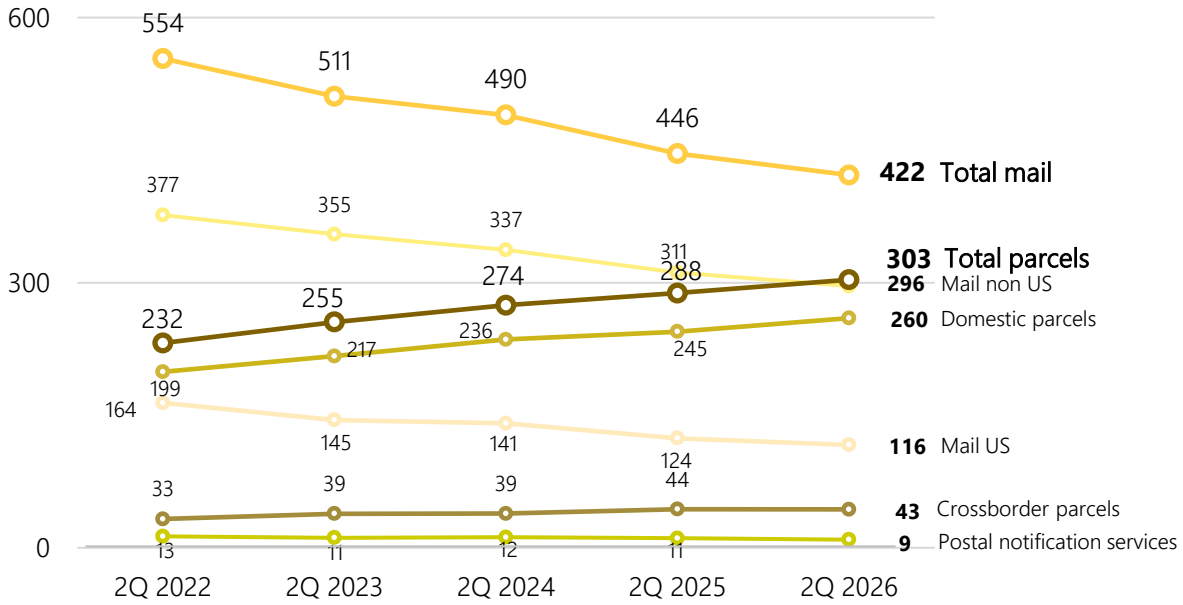
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



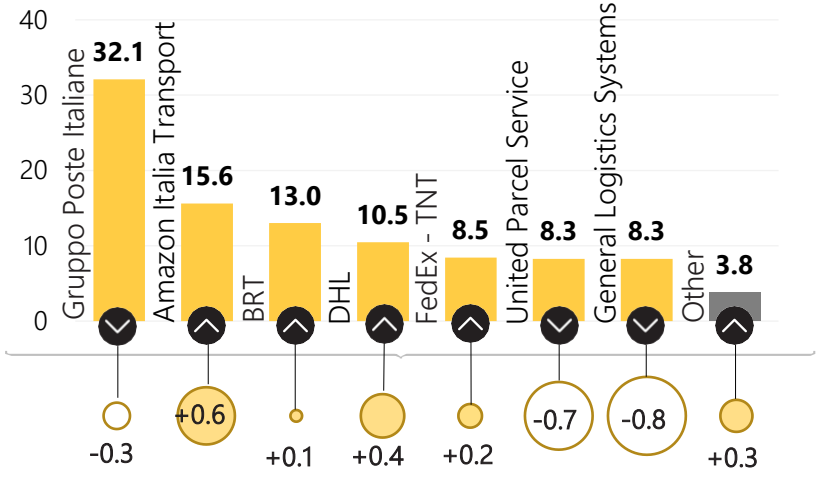
	Change in % (2021/22 – 2025/26)		Change in % (2024/25 – 2025/26)	
Mail services:	**-24.4**	↓	**-6.5**	↓
- Universal Service:	-30.5	↓	-4.7	↓
- Non Universal Service:	-22.0	↓	-7.2	↓
- Postal notification services:	-11.1	↓	-5.3	↓
Parcel delivery services:	**+34.5**	↑	**+6.6**	↑
- Domestic:	+33.3	↑	+6.6	↑
- Crossborder:	+42.0	↑	+6.3	↑

	Change in % (2Q 2022 – 2Q 2026)		Change in % (2Q 2025 – 2Q 2026)	
Mail services:	**-23.8**	↓	**-5.4**	↓
- Universal Service:	-29.1	↓	-6.1	↓
- Non Universal Service:	-21.3	↓	-4.8	↓
- Postal notification services:	-29.3	↓	-14.9	↓
Parcel delivery services:	**+30.9**	↑	**+5.2**	↑
- Domestic:	+30.6	↑	+6.2	↑
- Crossborder:	+33.0	↑	-0.5	↓

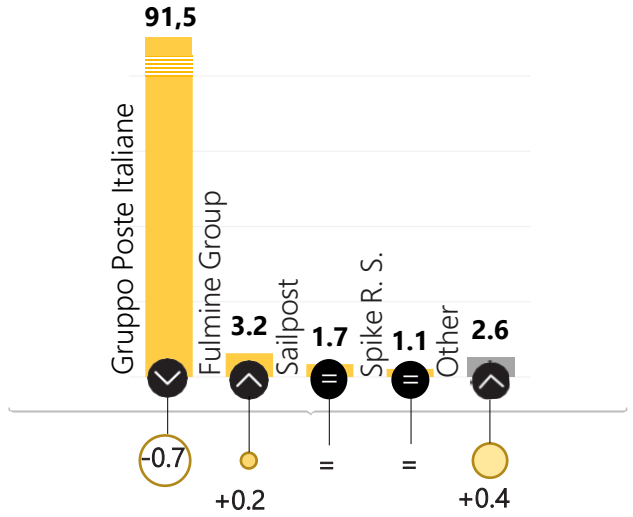
3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

JANUARY - JUNE 2026 – IN % OF TOTALE REVENUES (Universal service + Non Universal service)

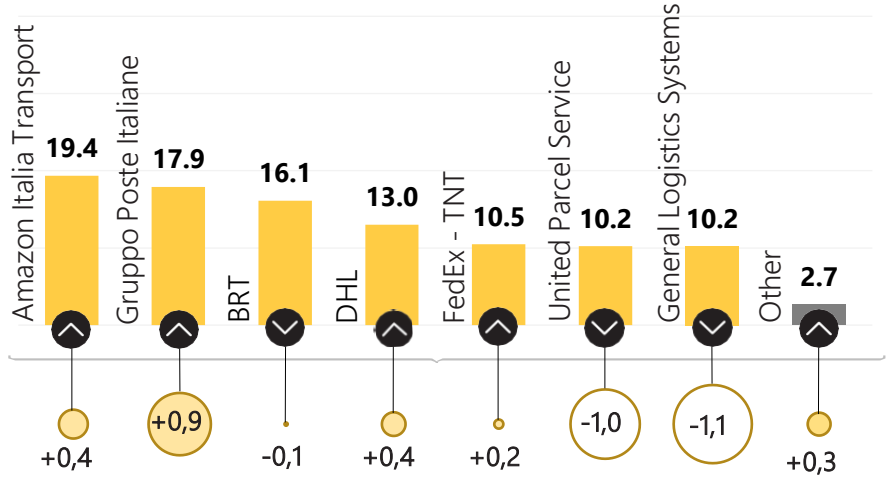
MAIL AND PARCEL DELIVERY SERVICES



MAIL SERVICES
(single + multiple items)

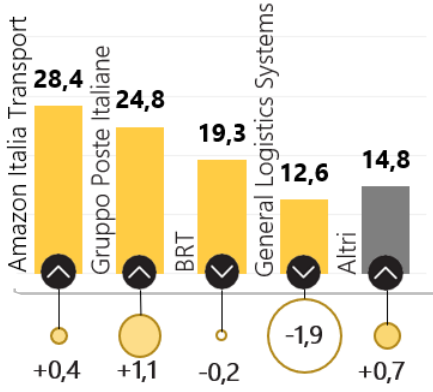


PARCEL DELIVERY SERVICES COURIERS

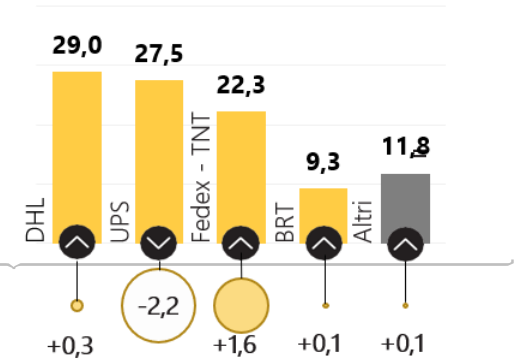


Differences vs. Jan. – Jun. 2024
(percentage points)

-of wich domestic



-of wich crossborder

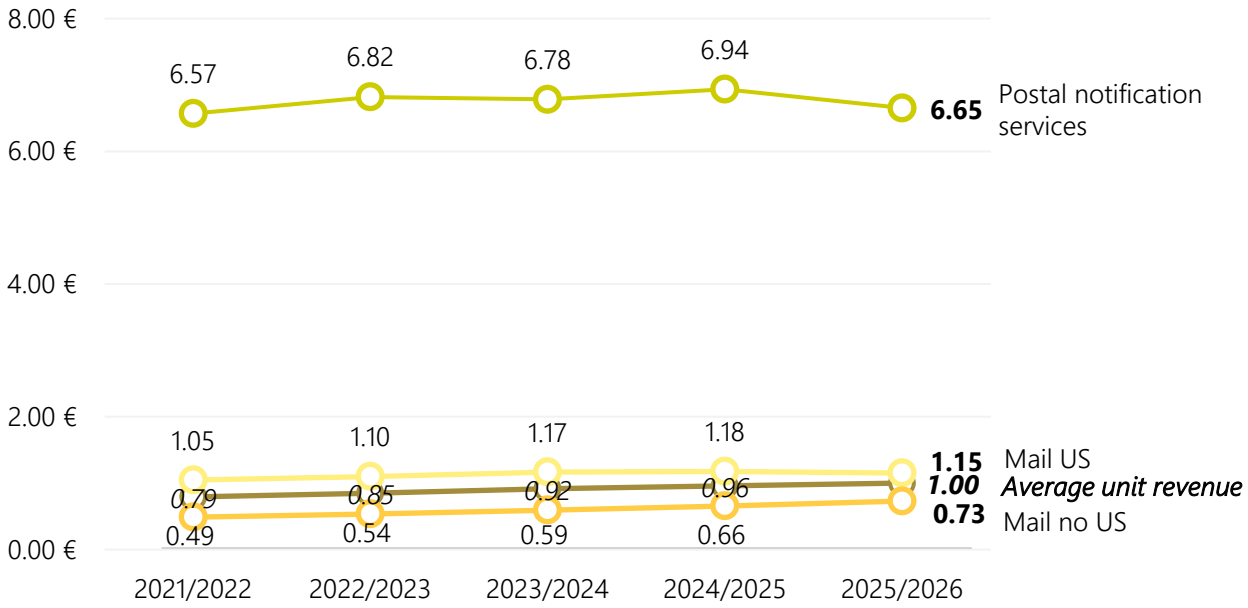


Differences vs. Jan. – Jun. 2024 (percentage points)

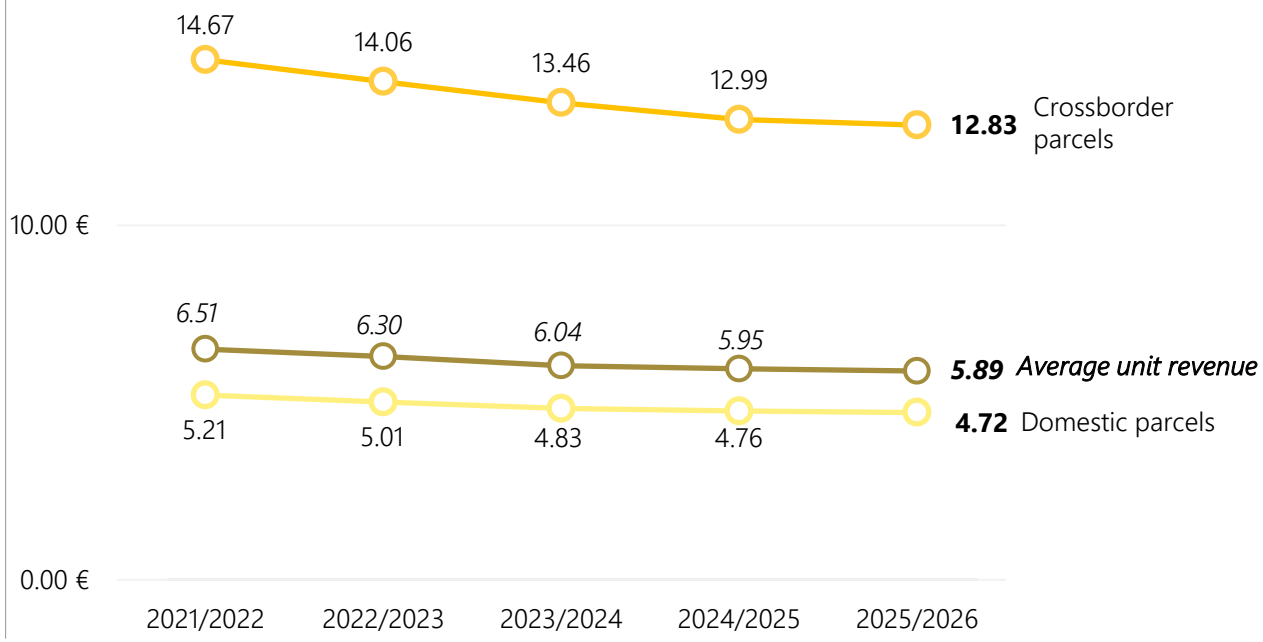
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group. Nexive Group S.r.l. and SDA Express Courier S.p.A.

3.10 POSTAL SERVICES: PER-UNIT REVENUES HISTORICAL TRENDS IN € (average last 12 month)

MAIL SERVICES



PARCELS DELIVERY SERVICES

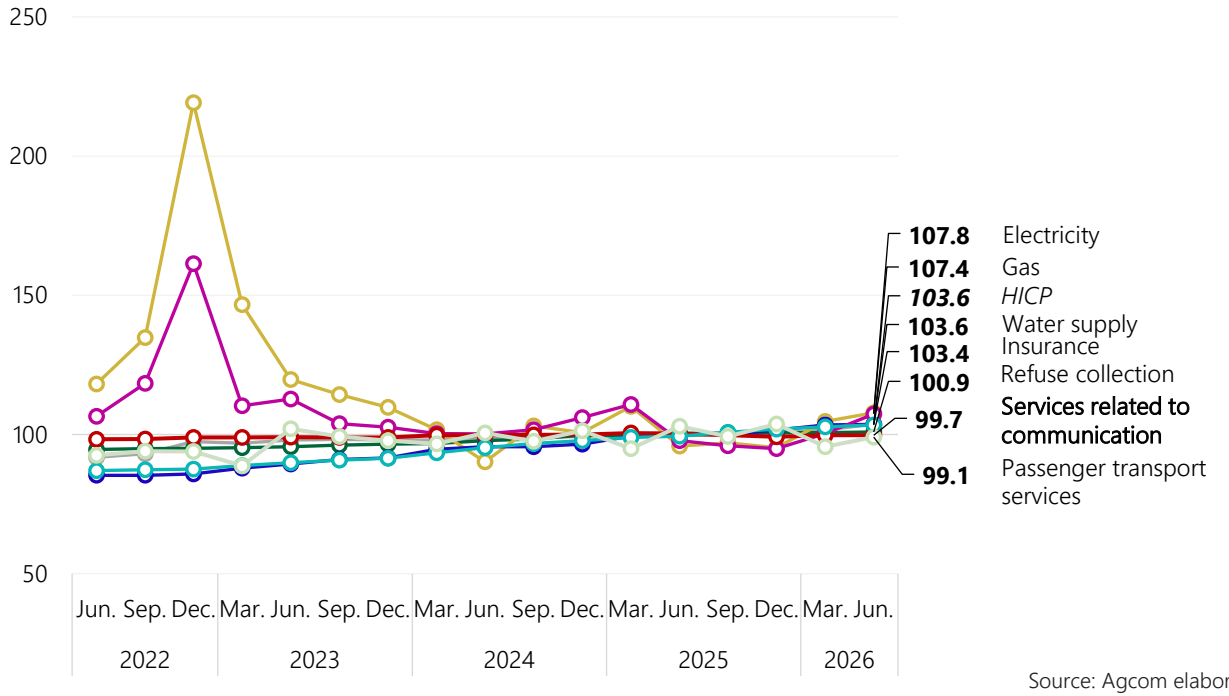


	Change in % (2021/22 – 2025/26)		Change in % (2024/25 – 2025/26)	
Average unit revenue:	**+26.3**	↑	**+4.3**	↑
- Mail US:	+10.1	↑	-2.0	↓
- Mail non US:	+49.6	↑	+11.1	↑
- Postal notification services:	+1.3	↑	-4.1	↓

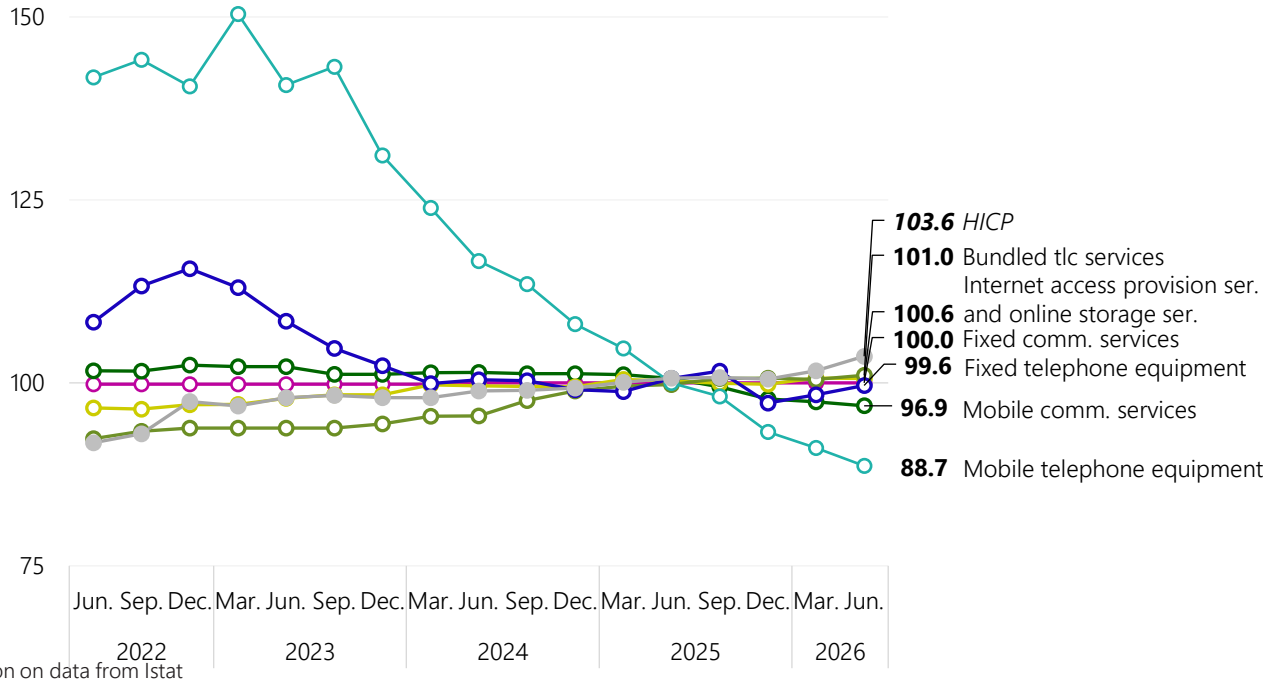
	Change in % (2021/22 – 2025/26)		Change in % (2024/25 – 2025/26)	
Average unit revenue:	**-9.5**	↓	**-1.1**	↓
Crossborder parcels:	-12.6	↓	-1.2	↓
- US:	*+4.1*	↑	*-0.8*	↓
- Non US:	*-12.5*	↓	*-1.1*	↓
Domestic parcels:	-9.5	↓	-0.9	↓
- US:	*+19.8*	↑	*+3.2*	↑
- Non US:	*-9.5*	↓	*-0.9*	↓

4.1 PRICE: HARMONISED CONSUMER PRICE INDEX, MAIN UTILITIES, FIXED TELEPHONY, MOBILE TELEPHONY AND INTERNET SERVICES AND OTHER UTILITIES PRICE INDICES (2025=100)

HICP INDEX AND MAIN SERVICES



FIXED, MOBILE, AND INTERNET SERVICES



Source: Agcom elaboration on data from Istat

	Change in % ('22 – '26)	Change in % ('25 – '26)
General Index HICP:	**+12.9** ↑	**+3.0** ↑
Water supply *(04.4.1)*:	**+21.5,** ↑	**+3.5** ↑
Refuse collection *(04.4.2)*:	**+6.6** ↑	**+1.2** ↑
Electricity *(04.5.1)*:	**-8.7** ↓	**+12.5** ↑

	Change in % ('22 – '26)	Change in % ('25 – '26)
Gas *(04.5.2)*:	**+0.8** ↑	**+9.8** ↑
Passenger transport ser. *(07.3.)*:	**+7.0** ↑	**-3.8** ↓
Insurance *(12.1)*:	**+18.8** ↑	**+4.0** ↑
Ser. related to communication: *(SERVCOMM)*	**+1.4** ↑	**-0.6** ↓

	Change in % ('22 – '26)	Change in % ('25 – '26)
Fixed telephone equipment *(08.1.1)*:	**-8.0** ↑	**-1.0** ↑
Mobile telephone equipment *(08.1.2)*:	**-37.4** ↓	**-11.3** ↓
Fixed communications services *(08.3.1.0)*:	**+0.2** ↓	**=**

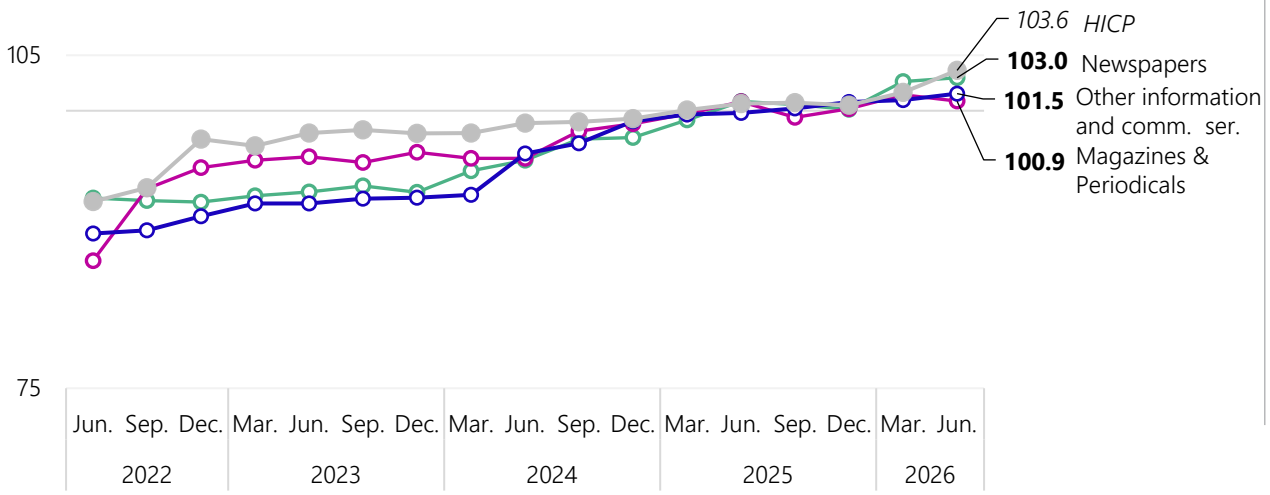
	Change in % ('22 – '26)	Change in % ('25 – '26)
Mobile communications services *(04.5.2)*:	**-4.7** ↓	**-3.7** ↓
Internet access provision services and online storage services *(08.3.3.0)*:	**+4.2** ↑	**+0.4** ↑
Bundled telecommunication services *(08.3.4)*:	**+9.4** ↑	**+1.3** ↑

(Code ECOICOP v.2 – European Classification of Individual Consumption by Purpose, v.2)

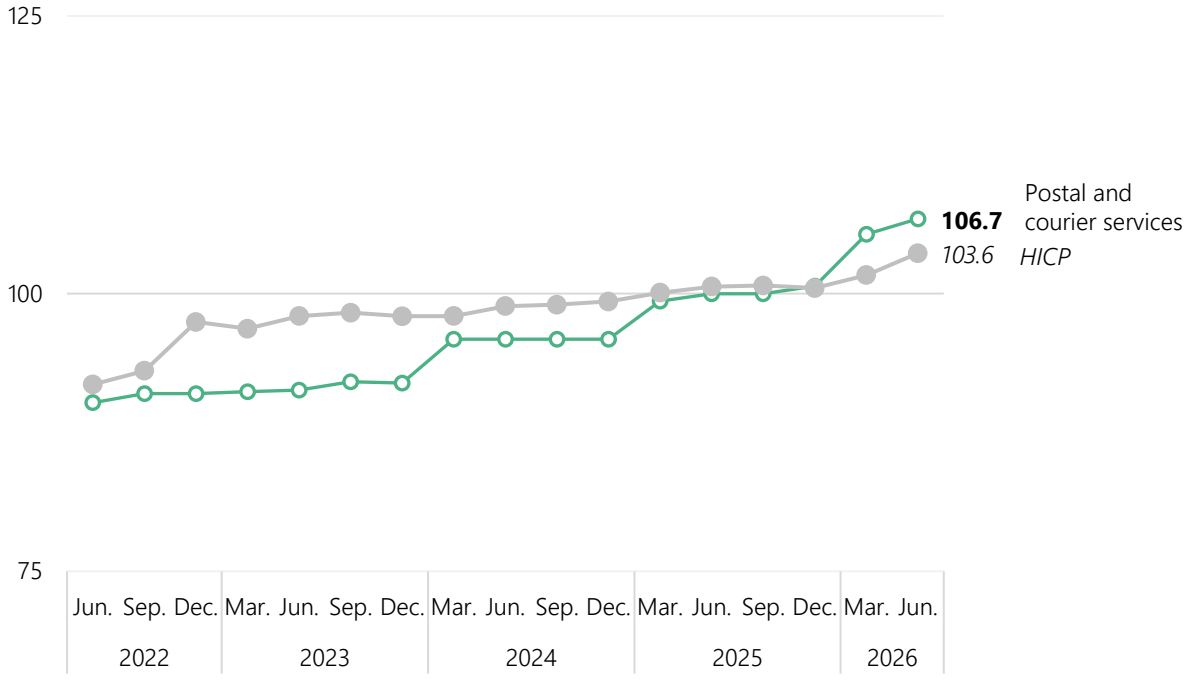
Note: starting from January 2026, ISTAT and Eurostat adopt ECOICOP 2 (European Classification of Individual Consumption by Purpose, version 2) as the new official statistical framework to classify goods and services in the consumer price basket. This update implements the international United Nations COICOP 2018 methodologies, substantially renewing the measurement criteria for inflation for the HICP index.

4.2 PRICE: DAILY NEWSPAPERS. MAGAZINES. TV AND POSTAL SERVICES PRICE INDICES (2010=100)

NEWSPAPERS. MAGAZINES. TV PRICE INDICES



POSTAL SERVICES PRICE INDEX



Source: Agcom elaboration on data from Istat

	Change in % ('22 – '26)	Change in % ('25 – '26)
Newspapers (*09.7.2.1*):	**+11.8** ↑	**+2.1** ↑
Other information and communication services (including Pay TV and video streaming subscriptions) (*08.3.9*):	**+14.2** ↑	**+1.7** ↑
Magazines and periodicals (*09.7.2.2*):	**+16.6** ↑	**=**

	Change in % ('22 – '26)	Change in % ('25 – '26)
Postal and courier services (*07.4.1*):	**+18.4** ↑	**+6.8.** ↑

(*Code ECOICOP v.2 – European Classification of Individual Consumption by Purpose, v.2*)

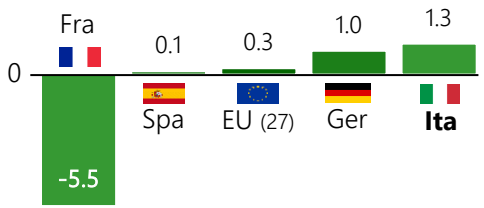
4.4 PRICE: INTERNATIONAL BENCHMARK

BUNDLED TELECOMMUNICATION SERVICES

(ECOICOP 08.3.4)

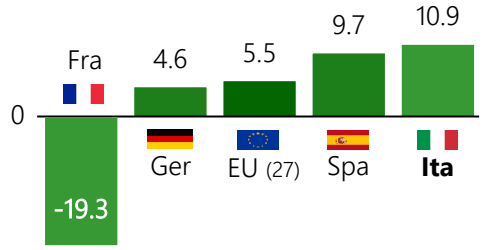
1-Year change %

Jun. 2025 - Jun. 2026



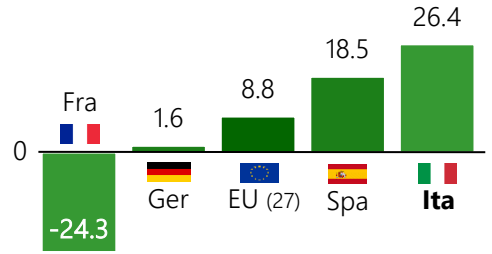
5-Year change %

Jun. 2021 - Jun. 2026



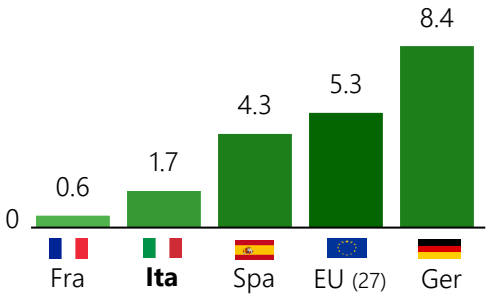
10-Year change %

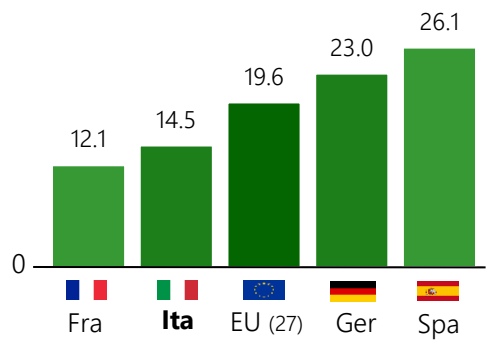
Jun. 2016 - Jun. 2026

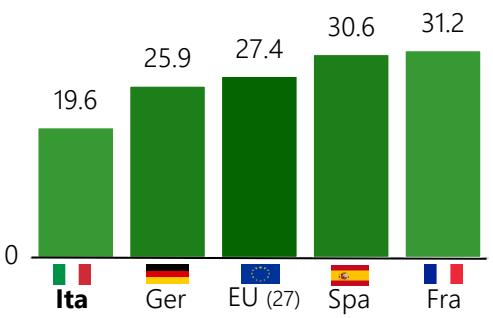


SUBSCRIPTIONS TO AUDIOVISUAL STREAMING SER. AND RENTAL OF AUDIOVISUAL CONTENT

(ECOICOP 08.3.9.2)

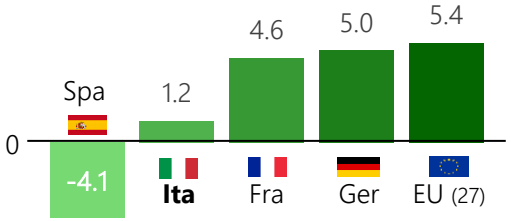


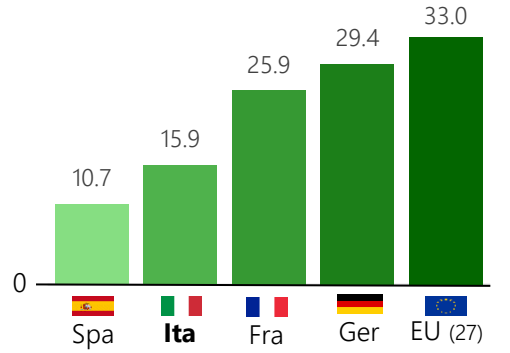


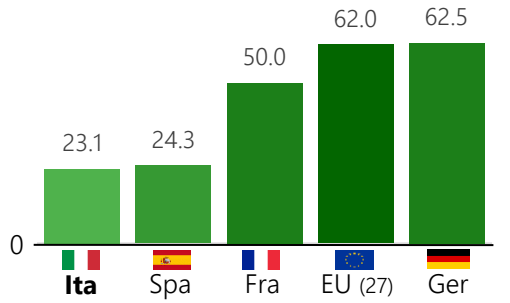


NEWSPAPERS AND MAGAZINES

(ECOICOP 09.7.2)

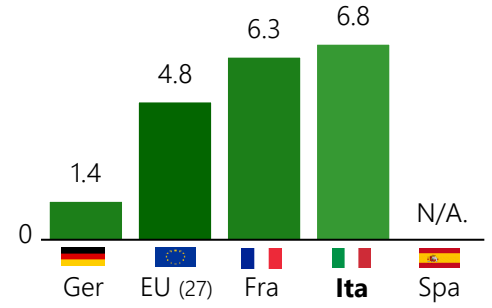


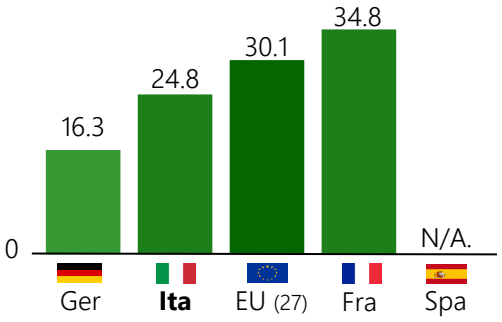


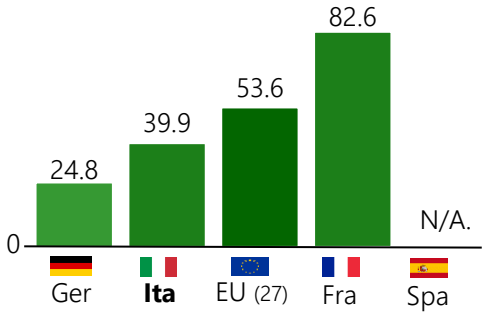


POSTAL AND COURIER SERVICES*

(ECOICOP 07.4.1)







*: estimated value for Spain.

Source: AGCOM elaborations on Eurostat data

AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no.3/2026

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