



MALTA COMMUNICATIONS AUTHORITY

Market Developments for Electronic Communications and Post

A Review of Outcomes for Q2 2026

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During the first half of 2026, demand for higher-speed fixed internet, post-paid mobile services and mobile data continued to grow, while Pay-TV subscriptions increased modestly and business demand for dedicated connectivity strengthened. In the postal sector, total mail volumes declined, although mail handled outside the universal service area continued to increase its share of the market, supported by growth in domestic and inbound cross-border activity.

Fixed internet

Fixed internet subscriptions reached 248,178 at the end of June 2026, an increase of 2.5% year-on-year.

Gigabit-capable services continued to gain traction, with subscriptions increasing by 34.6% year-on-year. As a result, approximately one in three fixed internet subscriptions are now subscribed to speeds of at least 1 Gbps.

Despite the continued shift towards higher-speed services, average revenue per internet user (ARPU) declined slightly, from €137.03 in the first half of 2025 to €136.10 in the first half of 2026.

Mobile telephony

The mobile telephony penetration rate increased to 141%, with subscriptions reaching 841,286 by the end of June 2026. The shift towards post-paid plans continued, with these subscriptions accounting for 58.0% of the total, up from 54.8% a year earlier.

Mobile usage became increasingly data-driven during the first half of 2026. Domestic mobile data consumption reached 97,651 million MB, representing a year-on-year increase of 39.3%. By contrast, traditional mobile services continued to contract, with outgoing voice calls, voice traffic minutes and SMS volumes declining by 3.4%, 2.6% and 3.1%, respectively.

Mobile telephony ARPU declined from €75.28 in the first half of 2025 to €71.49 in the first half of 2026. This development coincided with the continued shift towards post-paid plans, which commonly include bundled voice and data allowances.

Fixed telephony

The fixed telephony subscription base remained broadly stable, increasing by 0.8% year-on-year to 257,550 subscriptions at the end of June 2026. Enhanced fixed telephony subscriptions recorded stronger growth of 7.8%, although from a comparatively low base.

Traditional voice usage continued to decline, with outgoing calls falling by 9.9% and voice traffic minutes decreasing by 16.4% during the first half of 2026.

Fixed telephony ARPU also declined over the same period, from €47.83 to €45.55, as fixed telephony continued to be offered predominantly as part of bundled services.

Pay-TV

Pay-TV subscriptions increased by 2.0% year-on-year, reaching 203,084 by the end of June 2026. Bundled offers remained the principal means of accessing Pay-TV services, accounting for 82.8% of subscriptions.

Despite the modest increase in the subscriber base, Pay TV continued to be predominantly promoted through bundled offers. Over the same period, ARPU declined from €84.61 in the first half of 2025 to €80.60 in the first half of 2026.

High-quality dedicated connections

Business demand for dedicated connectivity continued to strengthen, reflecting the need for guaranteed performance, resilience and defined service-level commitments. The number of dedicated connections increased by 6.7% year-on-year, reaching 1,154 at the end of June 2026.

National connections continued to account for the largest share of the market and were concentrated mainly in the 100 Mbps to 500 Mbps speed range. International connections, by contrast, were more heavily concentrated at gigabit speeds, reflecting the higher-capacity requirements of internationally oriented and data-intensive businesses.

Postal activity

A total of 12.1 million mail items were handled across the Maltese Islands during the first half of 2026, representing a year-on-year decline of 1.03%. Mail within the universal service area continued to account for the majority of total volumes. However, the share of mail handled outside the universal service area increased to 21.0%, up from 18.6% a year earlier. Within the universal service area, letter mail and bulk mail volumes declined by 14.1% and 0.7%, respectively, while parcel volumes increased by 16.2%.

Outside the universal service area, inbound cross-border mail continued to account for a substantial share of activity, although its growth was more moderate than in previous years. On the other hand, domestic mail increased by 31% year-on-year. Together, growth in domestic and cross-border non-universal-service mail partly offset the decline in traditional mail.

Notes:

- (i) Data cut-off date: 28th September 2026.
 - (ii) Data is preliminary and subject to change.
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