SIGNED, SEALED... DELIVERED?



Last-Mile Delivery Report

Albania

2026

OCTOBER

Përshëndetje! Greetings!

Sealed off from the world before, packed with people now.

Albania.

A country changing faster than its infrastructure can follow. One of the most closed communities in Europe during the communist era, hosting **more than five times** its population in visitors now.

Tourist arrivals brought spending power and a wave of constructions. Something else came along, something harder to build for: **expectations**. The habits of Western consumers to a country with no time to prepare.

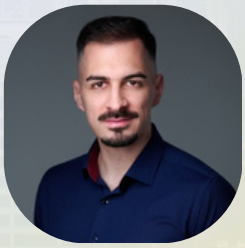
You can see it in the parcel numbers too.

In 2020, private couriers brought 129,000 parcels into the country in the whole year. In 2025 **they brought in three million**. Sum up domestic and outbound, and a country of fewer than three million people generated **7.35 million courier parcels** in a single year.

Nothing underneath changed to meet it. The same couriers, the same vans, the same delivery models.

Every European market that reached this point built **parcel lockers.**

Our job was to understand: why, on a small, yet loud market, nobody has built them yet.



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This is a condensed public version of a commissioned study,
published with the client's permission.

Methodology

On the ground

Two visits to Tirana, in September and October 2026. We sat down with courier companies, the e-commerce association, a startup incubator, the state technology park and the postal regulator. We also talked to ordinary shoppers about what they expect from a delivery. Those conversations shaped our questions.

At events

A one-day workshop for Albanian startups preparing for EU markets, an accelerator expo that brought Balkan founders together with investors, and a regional trade and investment forum.

Through data

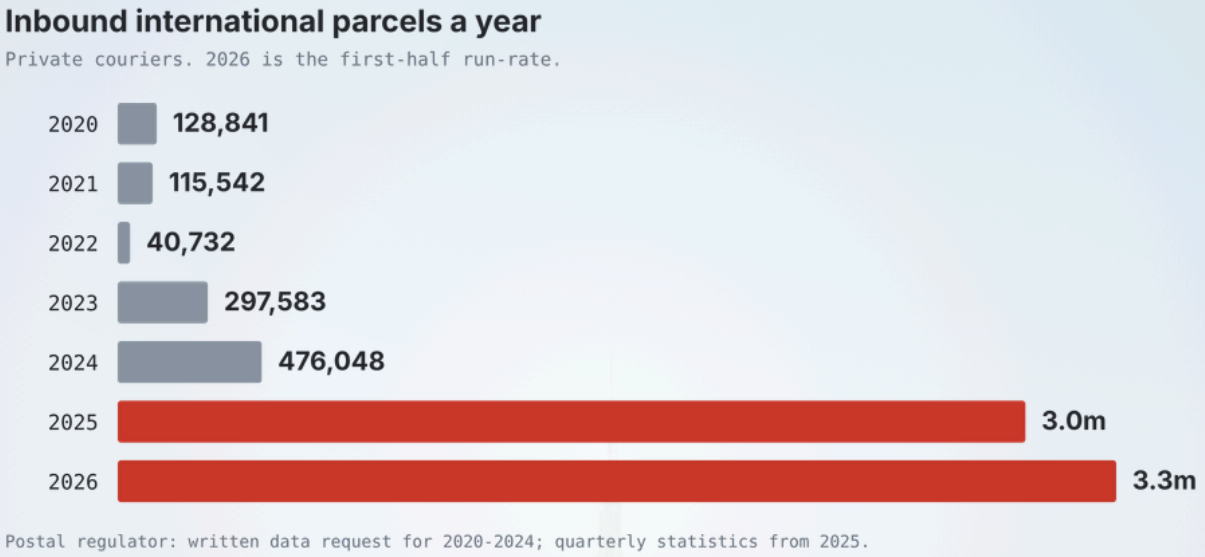
We used **statistics published by the postal regulator** on a quarterly basis. every quarter from the last two years. Upon our request, they also answered us in writing with parcel volumes going back to 2020 to see the trends better.

A small country, ordering “above its weight”

Until 2022 the postal regulator reported a steady, predictable market.

Door-to-door delivery was already a private business rather than postal: the national post carried fewer than 16,000 express parcels a year. **International was a rounding error.**

Inbound parcels then **more than doubled in 2023**, rose another 60% in 2024, and multiplied more than sixfold in 2025 as cross-border marketplaces arrived.



In 2025, Temu opened in Albania to challenge Alibaba and other competitors. The quarter it launched carried 1.24 million inbound parcels on its own. By the first half of 2026 inbound had settled at around 820,000 a quarter.



Parcel volumes do not multiply on their own.
Cheaper products with faster delivery arrived, and the parcels followed.

Cash is the design decision

What has blocked modern delivery models in Albania is not infrastructure. It is how people pay.

Cash at the door

Albanian e-commerce, 2026.

>90%
of domestic orders are still settled in cash on delivery

74-78%
across the whole market, cross-border included

25%
of cash orders are refused at the door at worst, and written off

Published market intelligence 2026; operator interviews, Tirana, October 2026.

Albanian consumers mostly have payment cards. What they **do not have** is enough **trust** in local online merchants to use them. The domestic transaction itself usually happens on a **Facebook or Instagram** page, where card payment is excluded by design.

Cross-border platforms were the exception for a while, because paying by card was the only way in. That exception has now closed: large cross-border shops accept cash on delivery through its local operators, so cross-border no longer converts buyers to card on its own.

The gap is not access to banking. It is confidence in the person at the other end.

The gap is trust, not access

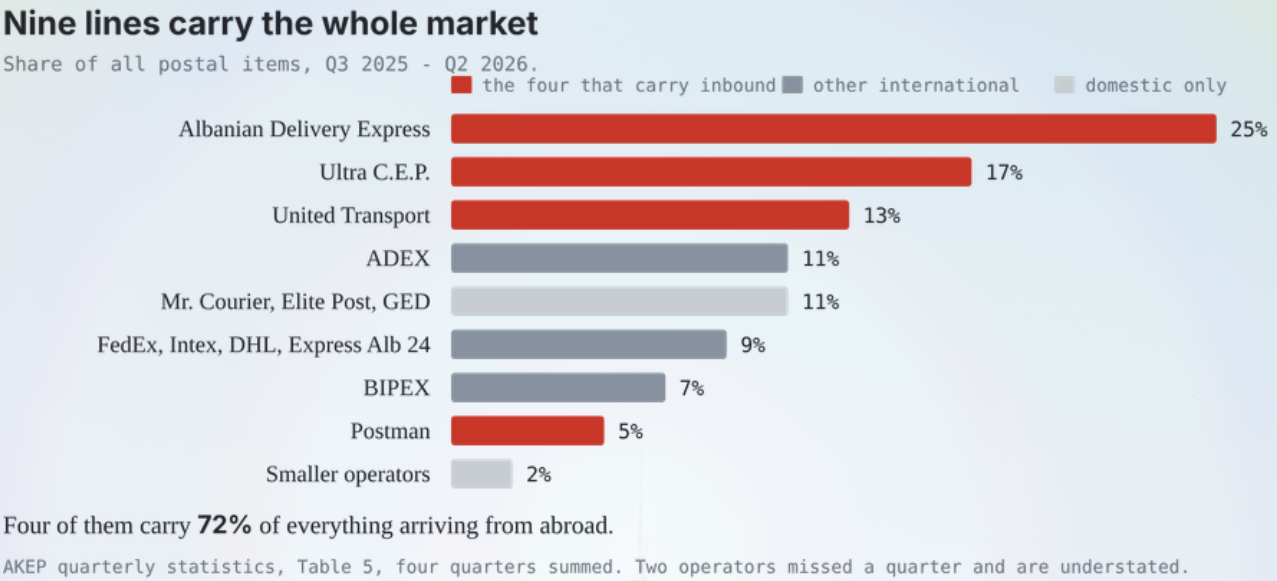
Share of adults. European Union average against Albania.



Published market intelligence on Albanian e-commerce, 2026, citing Eurostat and the Bank of Albania.

Who carries the parcels

Twenty-nine operators report to the regulator. Nine lines account for the entire market, and four of them carry nearly three quarters of products arriving from abroad.



Domestic and cross-border are two different businesses sharing the same vans.

Domestic ran to about four million parcels in 2025, up a fifth on the year and flat into 2026. **There is no large local webshop.** A few exist, but a **large share** of domestic orders is placed by chat **on Instagram and Facebook** pages: the buyer types what they want and where to send it, and somebody writes it down.

Cross-border ran to about three million in 2025 and is tracking higher in 2026. On peak days a single platform moves up to 15,000 parcels through its local partners.

One large marketplace reaches buyers through a courier network of more than a hundred collection points.

The order changes when you count money instead of boxes

The national post is almost invisible in the parcel count. On revenue it is first, ahead of the international integrator. Parcels and profit are not in the same business.

Volume is not revenue

Top five by parcels carried, against top five by revenue.



The national post is almost absent from the parcel count and first on revenue.

Volume: AKEP quarterly statistics, private operators. Revenue: AKEP postal market analysis 2025, whole market.

What delivery actually costs the operator

Three problems come up in every conversation, and none of them is incidental. They are what the delivery system is built around.

What delivery costs the operator

Three structural problems, not incidental ones.

15%
of 774,000 buildings are linked to an official street segment

94-97%
first-attempt success, bought by phoning every recipient

4 EUR
per returned parcel, against a European average of 2

Published market intelligence 2026; regulator's market analysis 2025; interviews, Tirana, October 2026.

What causes the real headaches

Addresses that do not resolve

Of more than 774,000 buildings in Albania, **around 15% are linked to an official street** segment. The national post's home-delivery success rate in 2024 was 43.1%, with incomplete addresses the main cause, worst in Tirana.

Success bought by telephone

Private couriers reach 94–97% first-attempt success. They do it by calling every recipient upon arrival, when the recipient cannot be found, leaving the parcel at a pickup point that **suits the route, not the customer**.

The delivery rate is real. It is paid for in labour.

Returns nobody has solved

A returned parcel costs around €4 against a European average of €2. Up to a quarter of cash-on-delivery orders are refused at the door, and each refusal is a second failed journey after the first one already failed.

Pricing

DOMESTIC COURIER PRICES, 2025–26

WEIGHT	TIRANA	OTHER CITIES
Under 2 kg	€1.50–2.00	€2.00–2.50
2–10 kg	€2.00	€2.50–3.00
National post	€2–4, three to five days	
International integrator	€4–7, one to two days	

Average shipping cost runs €2.30–3.50 per parcel, paid by the merchant. Below five kilos, weight barely moves the price; distance from Tirana moves it more. The ceiling is low and everyone knows where it is.

Good news: collection habit is already here

A locker network in Albania **would not be introducing a new behaviour.**
It would be offering the one people already perform, around the clock and without a counter.

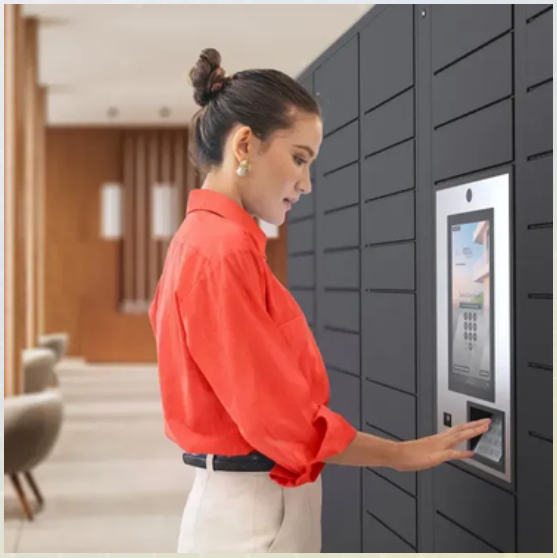
Cross-border buyers already receive a pickup location and a code, and collect within three days. That is **close to a locker network's exact pattern,** minus the machine. The market's largest operator has built a network of partner collection locations and city pickup points with extended hours, described in its own materials as a drop-off point network and presented as a practical Balkan adaptation for a market where locker infrastructure is not yet developed.

There is one difference worth noticing. The incumbent sites its points where orders are delivered. A locker network can also sit where people already go: next to the cash machines, not only the apartment blocks.

The state already asked for it

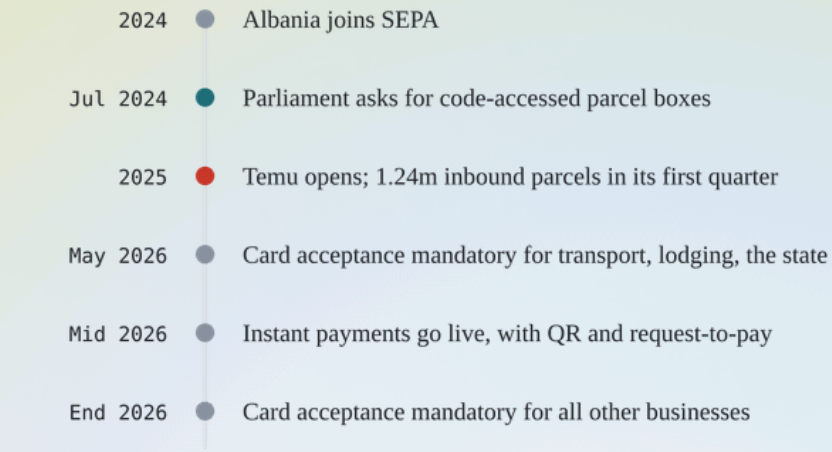
In July 2024, before the volume arrived, the Albanian parliament passed a resolution recommending code-accessed postal boxes near post offices, so that citizens could collect parcels at any hour with a unique code and the queues would end. More than two years on, the market has not reacted.

No queue, no counter, no phone call.
The three things Albanian delivery is built on.



Milestones, in order

One rule let the volume in. The others are aimed at the cash.



AKEP; Parliament of Albania Resolution 1581/2 of 4 July 2024; Law 79/2025 and the Law on Tax Procedures as amended.

A duty-free threshold. The quiet one. Albania charges **no import duty below €22,** and both consumers and sellers split purchases into separate shipments to stay under it. The rule does not change what people buy. It changes how many boxes it arrives in.

What could break an entry

Four things a locker operator would be walking into.

The rate is set by somebody else

The platform sets the per-parcel rate and can move its volume wholesale. A locker network funded out of that rate inherits the same exposure.

Cash expires slowly

The largest cross-border platform now takes cash through local operators, so cross-border no longer pulls buyers toward card by itself. The card-acceptance mandate changes shops, not habits.

Labour stays cheap

A minimum wage around €518 keeps staffed counters competitive, and couriers already reach 94–97% first-attempt success. A locker does not fix a failure rate; it removes phone calls, random drop-offs and refused cash orders.

Every site is a permit

A placed device carries its own fee or tax and a mandatory security badge with remote monitoring. Each unit may count as a separate entity.

real risk a cost, not a risk

The first two are the real risks. The rest are costs.

Interviews in Tirana, October 2026; regulator's market analysis 2025. Placement rules to be confirmed in writing.

Where this leaves the market

Fewer than three million people generated 7.35 million courier parcels last year, on a delivery system held together by hand.

The problems underneath are **structural rather than incidental:** addresses that do not resolve, a delivery rate bought with phone calls, parcels left wherever the route allows, and a quarter orders refused at the door.

A locker network answers most of that in one move. Collection at any hour, without a call, without a counter, and without a second failed journey. What it has to accommodate rather than fix is cash, still more than 70% of all orders and not expiring on anyone's schedule.

Demand is not the open question. People here already know out-of-home pickup and ask for it unprompted.

Albania deals with a chicken-and-egg problem.

Out-of-home pickup becomes normal once people pay by card, and people pay by card once there is enough worth paying card for. Whatever breaks that loop, and whenever it breaks, is what sets the moment to enter.

The question is: when will this happen?