

# Global Embedded SIMs (eSIM) Market Research Report 2026(Status and Outlook)

<https://marketpublishers.com/r/E0271451CEA7EN.html>

Date: March 2026

Pages: 146

Price: US\$ 2,980.00 (Single User License)

ID: E0271451CEA7EN

## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Embedded SIMs (eSIM) competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. eSIM (Embedded SIM) is a user identification technology that embeds the traditional SIM card directly into the device rather than as an independent removable component. The eSIM ICs is a hardware module that supports eSIM technology, allowing users to use mobile services by downloading and activating operator profiles without a physical SIM card. Built to GSMA specifications, eSIM ICs incorporate secure elements for authentication, encryption, and remote provisioning, allowing users to switch carriers or service plans over the air. Found in smartphones, tablets, wearables, IoT devices, and connected vehicles, ESIM supports multiple profiles, enhances device design flexibility, and simplifies global connectivity management. In 2024, the shipment volume of eSIM ICs will be about 500 million pieces, with an average price of US\$2 per piece. The upstream of eSIM IC involves the design and fabrication of secure integrated circuits by semiconductor manufacturers, including the development of embedded SIM hardware, secure elements, operating systems, and cryptographic modules. This stage requires advanced foundry processes, secure IC packaging, and compliance with GSMA standards for remote SIM provisioning. The downstream encompasses device makers?such as smartphone, tablet, wearable, automotive, and IoT manufacturers?who integrate eSIM Module into their products, as well as mobile network operators and connectivity platforms that activate, manage, and remotely provision subscriber profiles. Further downstream, eSIM-enabled devices flow into consumer and industrial sectors where users benefit from flexible carrier switching, enhanced device miniaturization, and improved security. Together, the value chain links semiconductor innovation upstream with global

connectivity services and mass-market device deployment downstream. The eSIM market is evolving from a niche convenience feature into a foundational connectivity layer for consumer devices, automotive telematics and massive IoT ? driven by demand for remote provisioning, smaller form factors, stronger security, and simplified logistics for device makers and operators. Key growth drivers are automotive OEMs standardizing on embedded UICCs for lifetime connectivity, the explosion of wearables and connected industrial sensors that benefit from zero-touch provisioning, and operators shifting business models toward subscription-based, multi-profile services; likewise, enterprises value the ability to manage fleets centrally (SM-DP+/SM-SR platforms). Obstacles remain: certification and GSMA-compliance overhead, operator commercial resistance in some markets, fragmentation of provisioning ecosystems, and the technical/organizational complexity of integrating eUICC, OTA platforms and lifecycle management. Two important technical trends shape the near future ? iSIM (SIM functionality integrated into main SoCs) which pushes further miniaturization and cost down, and tighter convergence of eSIM with secure connectivity stacks and modem vendors (reducing BOM and integration pain). Regionally, adoption is fastest where regulators and operators support remote provisioning and where device segments (automotive, wearables) are concentrated; emerging markets lag where operator models and certification create barriers. For incumbents and new entrants alike the winning strategy is clear: invest in GSMA-compliant security, build strong operator and SM-DP partnerships, offer robust lifecycle management tools, and roadmap iSIM-capable solutions ? because once provisioning and business models align, eSIM becomes a default connectivity choice rather than an optional feature.

The global Embedded SIMs (eSIM) market size was estimated at USD 965.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 8.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Embedded SIMs (eSIM) market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Embedded SIMs (eSIM) market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Embedded SIMs (eSIM) market.

### **Global Embedded SIMs (eSIM) Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

STMicroelectronics  
NXP  
Infineon  
Thales Group  
GCT Semiconductor  
IDEMIA  
Giesecke+Devrient  
VALID  
GCT Semiconductor  
Workz (Trasna)  
Unigroup Guoxin Microelectronics  
HuaDa Semiconductor

Henghui Technology

### **Market Segmentation (by Type)**

MFF2 Form-factor  
WLCSP Form-factor  
Others

### **Market Segmentation (by Application)**

Consumer Electronics  
Internet of Things  
Automobile  
Others

### **Geographic Segmentation**

North America (USA, Canada, Mexico)  
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)  
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)  
South America (Brazil, Argentina, Columbia, Rest of South America)  
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance  
Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered  
Historical, current, and projected market size, in terms of value  
In-depth analysis of the Embedded SIMs (eSIM) Market  
Overview of the regional outlook of the Embedded SIMs (eSIM) Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Embedded SIMs (eSIM) Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Embedded SIMs (eSIM), their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail,

including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

## **Customization of the Report**

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