

Global eSIM Device Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G28A4C87D640EN.html>

Date: September 2026

Pages: 116

Price: US\$ 4,480.00 (Single User License)

ID: G28A4C87D640EN

Abstracts

The global eSIM Device market size is expected to reach \$ 31925 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

eSIM Device refers to a cellular-connected terminal equipped with an embedded universal integrated circuit card, integrated secure element, or equivalent hardware and software environment that enables mobile network subscription profiles to be securely downloaded, installed, activated, switched, updated, and deleted through remote SIM provisioning. The product scope covers consumer devices, machine-to-machine equipment, and IoT terminals using GSMA consumer, M2M, or IoT eSIM architectures. Principal product forms include smartphones, tablets, smartwatches, wearable devices, laptops, 2-in-1 computers, cellular routers, mobile hotspots, automotive telematics units, smart meters, asset trackers, and industrial connected equipment. Key technical attributes include the supported remote provisioning architecture, eUICC security certification, number of stored and simultaneously active profiles, physical SIM and eSIM configuration, operator compatibility, profile-transfer capability, radio access technology, roaming performance, device-management interfaces, power consumption, environmental durability, and lifecycle support. eSIM Device products may support LPWA networks such as NB-IoT and LTE-M, conventional 4G LTE connectivity, 5G non-standalone or standalone networks, and selected cellular-satellite hybrid connections. The research focuses on devices in which eSIM capability forms an integrated and commercially usable element of cellular connectivity rather than a separately delivered mobile subscription service.

Key Findings

Smartphones represent the principal volume segment while wearables connected PCs and IoT terminals broaden the eSIM Device market

Consumer eSIM architecture leads current device commercialization while SGP.32 creates a scalable provisioning framework for constrained IoT equipment

Hybrid physical SIM plus eSIM configurations remain widespread although eSIM-only and dual-eSIM designs are gaining product coverage

Secure provisioning operator interoperability and lifecycle profile management are central product qualification requirements

Market Trends

The eSIM Device industry is progressing from selective adoption in premium smartphones and cellular wearables toward broader integration across mainstream mobile terminals, business computers, connected vehicles, and industrial IoT equipment. Smartphone design is gradually moving from physical SIM and eSIM hybrid configurations toward eSIM-only and dual-eSIM implementations, supported by simplified digital activation and device-to-device profile transfer. Android manufacturers are extending eSIM functionality across a wider range of flagship and mid-range products, although availability continues to vary by model, country, and operator. In the enterprise computer market, optional 4G and 5G eSIM connectivity is developing into a differentiating feature for always-connected laptops and detachable devices. The IoT segment is undergoing a more structural transition as the SGP.31 and SGP.32 architecture reduces dependence on complex M2M subscription-management arrangements and is designed for equipment with limited user interfaces, restricted power budgets, or large geographically distributed fleets. Longer-term development is moving toward tighter integration of secure subscriber functions with device chipsets, automated profile orchestration, remote fleet management, dual-active connectivity, private mobile network support, and cellular-satellite convergence. These changes position eSIM Device functionality as part of the device connectivity architecture rather than an isolated premium specification.

Market Dynamics

Drivers

Growth in the eSIM Device market is driven by demand for faster digital activation, simplified operator switching, international roaming flexibility, multi-line management, compact product design, improved resistance to water and dust, and centralized connectivity administration. Device manufacturers can reduce their dependence on removable card trays and create additional internal space for batteries, sensors, antennas, or structural components. Mobile operators and device vendors can activate service without the physical production and distribution of conventional SIM cards, while enterprise customers can provision geographically dispersed devices through digital workflows. The expansion of 5G networks, connected wearables, mobile computing, telematics, smart metering, logistics tracking, and industrial IoT further increases the number of terminals requiring remotely manageable cellular identities. Consumer adoption is also supported by international travelers who can add temporary local or regional profiles without replacing their primary subscription. For enterprises, eSIM Device deployment can improve inventory flexibility because a common hardware configuration may be assigned to different operators or markets later in the distribution process. These operational benefits strengthen the commercial rationale for eSIM integration across both consumer and professional equipment.

Restraints

Market development remains constrained by differences in operator support, regional regulations, device variants, activation procedures, and profile-transfer capabilities. An eSIM-capable product cannot deliver its intended connectivity unless the selected mobile operator supports the relevant device, provisioning method, frequency bands, and commercial plan. Manufacturers therefore continue to produce different SIM configurations for different countries, reducing the economies of scale expected from a fully digital design. Carrier certification, eUICC compliance, radio testing, software integration, cybersecurity validation, and customer-support preparation increase product-development costs and time to market. Consumers may also face difficulty transferring an eSIM between operating systems, replacing a damaged device, restoring a deleted profile, or determining whether a travel profile supports voice, messaging, emergency calling, or data only. In industrial applications, existing M2M deployments may rely on long-certified platforms and multi-year contracts, slowing migration to newer IoT architectures. Entry-level devices remain particularly price sensitive, and manufacturers may continue using physical SIM solutions where eSIM hardware, software, certification, and support costs cannot be recovered through higher selling prices or

service value.

Opportunities

The largest development opportunities arise from expanding eSIM Device adoption beyond premium smartphones into IoT fleets, connected PCs, wearable products, automotive systems, routers, smart meters, and field-service equipment. SGP.32 provides an important commercial opportunity for manufacturers of interface-constrained IoT terminals because it supports more scalable remote subscription management without requiring users to perform smartphone-style profile installation. Always-connected laptops represent another attractive segment as enterprises seek secure cellular alternatives to public Wi-Fi and want connectivity policies to be deployed through centralized device-management systems. Cellular smartwatches can support independent communication, shared-number services, health monitoring, and emergency functions without continuous dependence on a paired smartphone. Automotive and logistics applications can use remotely configurable profiles to support cross-border operations, vehicle exports, fleet reassignment, and operator changes over extended product lifecycles. Further opportunities exist in emerging markets as operators expand eSIM activation, manufacturers introduce compatible mid-range devices, and travel connectivity increases consumer familiarity. Suppliers that simplify activation, profile transfer, device replacement, fleet provisioning, and multi-operator management can capture value beyond basic hardware functionality.

Challenges

The principal industry challenge is maintaining security and interoperability across a multi-party ecosystem involving device manufacturers, eUICC suppliers, operating-system developers, provisioning-platform providers, mobile operators, enterprises, and end users. Profile credentials must remain protected during manufacturing, downloading, activation, transfer, suspension, deletion, repair, resale, and end-of-life processing. A security weakness in the device, local profile assistant, provisioning platform, certificate chain, or customer-authentication process can affect subscriber identity and network access. At the same time, different operators may implement activation codes, entitlement servers, transfer processes, and customer-verification procedures differently, creating inconsistent user experiences despite common technical specifications. eSIM-only products also increase the importance of reliable digital recovery because a failed activation or deleted profile can leave the device without cellular service. Industrial and automotive products introduce additional

challenges related to long service lives, network sunsets, ownership changes, remote locations, restricted interfaces, and software-maintenance obligations. Manufacturers must therefore combine standards compliance with extensive operator testing, secure update capability, clear support procedures, and long-term profile-management arrangements.

Industry Chain Analysis

The upstream eSIM Device industry chain consists of semiconductor wafers, secure-element and eUICC chips, integrated SIM solutions, cellular modems, application processors, radio-frequency components, antennas, memory, power-management components, operating systems, cryptographic certificates, and remote SIM provisioning software. Secure hardware suppliers must provide tamper resistance, protected key storage, authentication, and lifecycle controls, while chipset and modem suppliers determine the supported cellular standards, frequency bands, power consumption, and network performance. Provisioning-platform participants provide functions such as profile preparation, secure profile delivery, entitlement management, certificate administration, and subscription discovery. These elements are supported by GSMA specifications, compliance programs, security accreditation, device testing, and operator certification. The cost of adding eSIM hardware may represent only a limited portion of the complete device bill of materials, but software integration, security validation, carrier testing, regional product variants, and continuing lifecycle support can create significant indirect expenditure.

The midstream consists of smartphone, wearable, PC, router, telematics, and IoT equipment manufacturers that integrate eUICC hardware, cellular modems, antennas, operating-system functions, local profile assistants, user interfaces, and device-management software into finished products. Value is created through reliable activation, broad operator compatibility, profile transfer, dual-SIM operation, low power consumption, compact integration, and secure lifecycle management. Downstream participants include mobile network operators, MVNOs, global connectivity providers, enterprises, vehicle manufacturers, utility companies, industrial operators, distributors, retailers, travel-service platforms, and end users. Consumer devices are commonly monetized through hardware sales and operator service plans, while enterprise and IoT applications may combine hardware, connectivity, provisioning, fleet management, and technical support under recurring contracts. Profitability increasingly depends on ecosystem integration and service reliability rather than the presence of an eUICC component alone.

Segment Insights

By device form factor, smartphones account for the largest share of commercial eSIM Device demand because of their high shipment volume, direct operator relationships, and established consumer remote-provisioning architecture. Premium smartphones initially led adoption, but compatible products are expanding across broader price bands. Smartwatches and other wearables form an important secondary segment because eSIM enables independent cellular communication while eliminating the space requirement of a removable SIM tray. Tablets, laptops, and 2-in-1 computers occupy a higher-price but lower-volume segment, with demand concentrated among enterprises, mobile professionals, public-sector users, and field personnel requiring secure, always-available connectivity. Cellular routers and hotspots benefit from flexible operator selection and international deployment, while automotive, metering, tracking, and industrial devices provide longer lifecycle opportunities and recurring connectivity-management demand.

By provisioning architecture, consumer eSIM Device products based on SGP.21 and SGP.22 currently represent the most developed commercial segment, supported by mature smartphone operating systems and operator activation processes. Traditional SGP.01 and SGP.02 M2M devices retain an established position in automotive, utility, and industrial deployments requiring centralized subscription control. SGP.31 and SGP.32 IoT devices are expected to become a key development direction because the architecture is designed for constrained equipment and scalable fleet management. By network capability, 5G eSIM Devices command higher average selling prices in smartphones, PCs, routers, and telematics equipment, while 4G LTE remains important across mass-market and industrial applications. NB-IoT and LTE-M products address low-data-rate, low-power, and extended-lifecycle use cases in metering, monitoring, and asset tracking.

Downstream Market Opportunities

Downstream opportunities differ according to connectivity intensity and device lifecycle. Personal communications and international travel favor devices that support rapid activation, multiple stored profiles, dual-line use, and convenient profile transfer. Enterprise mobility creates demand for laptops, tablets, smartphones, and field terminals that can be remotely configured under corporate security and device-management policies. Connected wearables benefit from independent calling,

messaging, health monitoring, location, and emergency functions. Automotive, logistics, and asset-tracking applications require cross-border coverage, long-term operator flexibility, remote diagnostics, and connectivity continuity during ownership or fleet changes. Smart metering, utilities, industrial automation, and remote monitoring favor low-power eSIM Device products capable of operating for extended periods in locations where physical SIM replacement is costly or impractical. Healthcare, public safety, and field-service users place greater emphasis on network reliability, security, and rapid replacement. Manufacturers and connectivity partners that offer pre-integrated operator profiles, simplified enterprise deployment, global coverage, remote lifecycle management, and long-term technical support can capture a larger share of downstream value than suppliers competing only on hardware price.

Regional Insights

North America and Europe represent relatively mature eSIM Device markets, supported by extensive operator commercialization, high penetration of premium smartphones and connected wearables, developed digital sales channels, and enterprise demand for always-connected devices. North America has been an important market for eSIM-only smartphone configurations, while European demand continues to favor a mixture of physical SIM plus eSIM, eSIM-only, and dual-eSIM designs. The European market also provides opportunities for cellular laptops, travel connectivity, sustainable device design, and cross-border profile use. Nevertheless, support can still differ among countries, operators, device models, and distribution variants, requiring manufacturers to maintain detailed compatibility programs.

Asia-Pacific is the principal global manufacturing base for smartphones, wearables, computers, communication modules, and IoT equipment and represents a major long-term volume opportunity for eSIM Device products. Adoption varies substantially across the region because of differences in telecommunications regulation, identity-registration requirements, operator readiness, domestic device ecosystems, and policies governing smartphone eSIM activation. China has established eSIM use in wearables, tablets, and IoT applications and has moved into smartphone eSIM commercialization, creating opportunities for domestic device manufacturers and ecosystem suppliers. Japan and South Korea have advanced mobile-device industries and established operator support, while Southeast Asia, India, the Middle East, Latin America, and Africa provide progressive opportunities through smartphone replacement, international travel, connected-device growth, and additional operator launches. Affordability, distribution coverage, and activation simplicity remain important determinants in emerging markets.

Competitive Landscape Analysis

The eSIM Device competitive landscape consists of global smartphone platform leaders, diversified consumer-electronics manufacturers, PC suppliers, wearable-device specialists, automotive and industrial equipment providers, and regional device brands. Competition in smartphones is shaped by operating-system integration, operator certification, profile transfer, dual-SIM functionality, regional model coverage, security, and the ability to make activation understandable to consumers. Leading premium-device manufacturers influence the market by expanding eSIM-only and dual-eSIM designs, while Android manufacturers compete through broader model portfolios, flexible physical SIM and eSIM combinations, and faster expansion into mid-range price bands. PC manufacturers differentiate products through optional 4G or 5G connectivity, enterprise device management, security, and relationships with global connectivity providers. Wearable suppliers focus on compact design, battery efficiency, shared-number services, standalone communication, and health or emergency functions. Industrial and IoT suppliers compete through low-power operation, environmental durability, global radio coverage, long product lifecycles, SGP.32 readiness, and fleet-management integration. Sustainable competitive advantage increasingly depends on coordination with operators and provisioning partners, as hardware capability without broad activation support provides limited end-user value.

Report Scope

This report studies the global eSIM Device demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for eSIM Device, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of eSIM Device that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global eSIM Device total market, 2021-2032, (USD Million)

Global eSIM Device total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: eSIM Device total market, key domestic companies, and share, (USD Million)

Global eSIM Device revenue by player, revenue and market share 2021-2026, (USD Million)

Global eSIM Device total market by Type, CAGR, 2021-2032, (USD Million)

Global eSIM Device total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global eSIM Device market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Apple Inc., Samsung Electronics Co., Ltd., Google LLC, Motorola Mobility LLC, Microsoft Corporation, HP Inc., Lenovo Group Limited, Huawei Technologies Co., Ltd., Xiaomi Corporation, OPPO Guangdong Mobile Telecommunications Corp., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world eSIM Device market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global eSIM Device Market, By Region:

Global eSIM Device Supply, Demand and Key Producers, 2026-2032

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global eSIM Device Market, Segmentation by Type:

eSIM Smartphones

eSIM Tablets

eSIM Smartwatches and Wearables

eSIM Laptops and 2-in-1 PCs

Others

Global eSIM Device Market, Segmentation by Primary Cellular Network Capability:

LPWA eSIM Devices Based on NB-IoT or LTE-M

4G LTE eSIM Devices from LTE Cat 1 to Cat 20

5G NSA and SA eSIM Devices

Others

Global eSIM Device Market, Segmentation by Device Selling Price:

Entry-Level eSIM Devices Below US\$200

Mid-Range eSIM Devices from US\$200 to US\$499

Premium eSIM Devices from US\$500 to US\$999

High-End and Specialized eSIM Devices at US\$1,000 and Above

Global eSIM Device Market, Segmentation by Application:

Personal Mobile Communications

International Travel and Roaming

Enterprise Mobility and Remote Work

Connected Wearables

Connected Vehicles and Telematics

Industrial IoT and Smart Manufacturing

Others

Companies Profiled:

Apple Inc.

Samsung Electronics Co., Ltd.

Google LLC

Motorola Mobility LLC

Microsoft Corporation

HP Inc.

Lenovo Group Limited

Huawei Technologies Co., Ltd.

Xiaomi Corporation

OPPO Guangdong Mobile Telecommunications Corp., Ltd.

Sony Corporation

HMD Global Oy

Key Questions Answered

1. How big is the global eSIM Device market?
2. What is the demand of the global eSIM Device market?
3. What is the year over year growth of the global eSIM Device market?
4. What is the total value of the global eSIM Device market?
5. Who are the Major Players in the global eSIM Device market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 eSIM Device Introduction
- 1.2 World eSIM Device Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World eSIM Device Total Market by Region (by Headquarter Location)
 - 1.3.1 World eSIM Device Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company eSIM Device Revenue (2021-2032)
 - 1.3.3 China Based Company eSIM Device Revenue (2021-2032)
 - 1.3.4 Europe Based Company eSIM Device Revenue (2021-2032)
 - 1.3.5 Japan Based Company eSIM Device Revenue (2021-2032)
 - 1.3.6 South Korea Based Company eSIM Device Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company eSIM Device Revenue (2021-2032)
 - 1.3.8 India Based Company eSIM Device Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 eSIM Device Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World eSIM Device Consumption Value (2021-2032)
- 2.2 World eSIM Device Consumption Value by Region
 - 2.2.1 World eSIM Device Consumption Value by Region (2021-2026)
 - 2.2.2 World eSIM Device Consumption Value Forecast by Region (2027-2032)
- 2.3 United States eSIM Device Consumption Value (2021-2032)
- 2.4 China eSIM Device Consumption Value (2021-2032)
- 2.5 Europe eSIM Device Consumption Value (2021-2032)
- 2.6 Japan eSIM Device Consumption Value (2021-2032)
- 2.7 South Korea eSIM Device Consumption Value (2021-2032)
- 2.8 ASEAN eSIM Device Consumption Value (2021-2032)
- 2.9 India eSIM Device Consumption Value (2021-2032)

3 WORLD ESIM DEVICE COMPANIES COMPETITIVE ANALYSIS

- 3.1 World eSIM Device Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)

- 3.2.1 Global eSIM Device Industry Rank of Major Players
- 3.2.2 Global Concentration Ratios (CR4) for eSIM Device in 2025
- 3.2.3 Global Concentration Ratios (CR8) for eSIM Device in 2025
- 3.3 eSIM Device Company Evaluation Quadrant
- 3.4 eSIM Device Market: Overall Company Footprint Analysis
 - 3.4.1 eSIM Device Market: Region Footprint
 - 3.4.2 eSIM Device Market: Company Product Type Footprint
 - 3.4.3 eSIM Device Market: Company Product Application Footprint
- 3.5 Competitive Environment
 - 3.5.1 Historical Structure of the Industry
 - 3.5.2 Barriers of Market Entry
 - 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

- 4.1 United States VS China: eSIM Device Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: eSIM Device Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: eSIM Device Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: eSIM Device Consumption Value Comparison
 - 4.2.1 United States VS China: eSIM Device Consumption Value Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: eSIM Device Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States Based eSIM Device Companies and Market Share, 2021-2026
 - 4.3.1 United States Based eSIM Device Companies, Headquarters (States, Country)
 - 4.3.2 United States Based Companies eSIM Device Revenue, (2021-2026)
- 4.4 China Based Companies eSIM Device Revenue and Market Share, 2021-2026
 - 4.4.1 China Based eSIM Device Companies, Company Headquarters (Province, Country)
 - 4.4.2 China Based Companies eSIM Device Revenue, (2021-2026)
- 4.5 Rest of World Based eSIM Device Companies and Market Share, 2021-2026
 - 4.5.1 Rest of World Based eSIM Device Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies eSIM Device Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World eSIM Device Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 eSIM Smartphones

5.2.2 eSIM Tablets

5.2.3 eSIM Smartwatches and Wearables

5.2.4 eSIM Laptops and 2-in-1 PCs

5.2.5 Others

5.3 Market Segment by Type

5.3.1 World eSIM Device Market Size by Type (2021-2026)

5.3.2 World eSIM Device Market Size by Type (2027-2032)

5.3.3 World eSIM Device Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY PRIMARY CELLULAR NETWORK CAPABILITY

6.1 World eSIM Device Market Size Overview by Primary Cellular Network Capability: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Primary Cellular Network Capability

6.2.1 LPWA eSIM Devices Based on NB-IoT or LTE-M

6.2.2 4G LTE eSIM Devices from LTE Cat 1 to Cat 20

6.2.3 5G NSA and SA eSIM Devices

6.2.4 Others

6.3 Market Segment by Primary Cellular Network Capability

6.3.1 World eSIM Device Market Size by Primary Cellular Network Capability (2021-2026)

6.3.2 World eSIM Device Market Size by Primary Cellular Network Capability (2027-2032)

6.3.3 World eSIM Device Market Size Market Share by Primary Cellular Network Capability (2027-2032)

7 MARKET ANALYSIS BY DEVICE SELLING PRICE

7.1 World eSIM Device Market Size Overview by Device Selling Price: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Device Selling Price

7.2.1 Entry-Level eSIM Devices Below US\$200

- 7.2.2 Mid-Range eSIM Devices from US\$200 to US\$499
- 7.2.3 Premium eSIM Devices from US\$500 to US\$999
- 7.2.4 High-End and Specialized eSIM Devices at US\$1,000 and Above
- 7.3 Market Segment by Device Selling Price
 - 7.3.1 World eSIM Device Market Size by Device Selling Price (2021-2026)
 - 7.3.2 World eSIM Device Market Size by Device Selling Price (2027-2032)
 - 7.3.3 World eSIM Device Market Size Market Share by Device Selling Price (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

- 8.1 World eSIM Device Market Size Overview by Application: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Application
 - 8.2.1 Personal Mobile Communications
 - 8.2.2 International Travel and Roaming
 - 8.2.3 Enterprise Mobility and Remote Work
 - 8.2.4 Connected Wearables
 - 8.2.5 Connected Vehicles and Telematics
 - 8.2.6 Industrial IoT and Smart Manufacturing
 - 8.2.7 Others
- 8.3 Market Segment by Application
 - 8.3.1 World eSIM Device Market Size by Application (2021-2026)
 - 8.3.2 World eSIM Device Market Size by Application (2027-2032)
 - 8.3.3 World eSIM Device Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

- 9.1 Apple Inc.
 - 9.1.1 Apple Inc. Details
 - 9.1.2 Apple Inc. Major Business
 - 9.1.3 Apple Inc. eSIM Device Product and Services
 - 9.1.4 Apple Inc. eSIM Device Revenue, Gross Margin and Market Share (2021-2026)
 - 9.1.5 Apple Inc. Recent Developments/Updates
 - 9.1.6 Apple Inc. Competitive Strengths & Weaknesses
- 9.2 Samsung Electronics Co., Ltd.
 - 9.2.1 Samsung Electronics Co., Ltd. Details
 - 9.2.2 Samsung Electronics Co., Ltd. Major Business
 - 9.2.3 Samsung Electronics Co., Ltd. eSIM Device Product and Services
 - 9.2.4 Samsung Electronics Co., Ltd. eSIM Device Revenue, Gross Margin and Market

Share (2021-2026)

9.2.5 Samsung Electronics Co., Ltd. Recent Developments/Updates

9.2.6 Samsung Electronics Co., Ltd. Competitive Strengths & Weaknesses

9.3 Google LLC

9.3.1 Google LLC Details

9.3.2 Google LLC Major Business

9.3.3 Google LLC eSIM Device Product and Services

9.3.4 Google LLC eSIM Device Revenue, Gross Margin and Market Share

(2021-2026)

9.3.5 Google LLC Recent Developments/Updates

9.3.6 Google LLC Competitive Strengths & Weaknesses

9.4 Motorola Mobility LLC

9.4.1 Motorola Mobility LLC Details

9.4.2 Motorola Mobility LLC Major Business

9.4.3 Motorola Mobility LLC eSIM Device Product and Services

9.4.4 Motorola Mobility LLC eSIM Device Revenue, Gross Margin and Market Share

(2021-2026)

9.4.5 Motorola Mobility LLC Recent Developments/Updates

9.4.6 Motorola Mobility LLC Competitive Strengths & Weaknesses

9.5 Microsoft Corporation

9.5.1 Microsoft Corporation Details

9.5.2 Microsoft Corporation Major Business

9.5.3 Microsoft Corporation eSIM Device Product and Services

9.5.4 Microsoft Corporation eSIM Device Revenue, Gross Margin and Market Share

(2021-2026)

9.5.5 Microsoft Corporation Recent Developments/Updates

9.5.6 Microsoft Corporation Competitive Strengths & Weaknesses

9.6 HP Inc.

9.6.1 HP Inc. Details

9.6.2 HP Inc. Major Business

9.6.3 HP Inc. eSIM Device Product and Services

9.6.4 HP Inc. eSIM Device Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 HP Inc. Recent Developments/Updates

9.6.6 HP Inc. Competitive Strengths & Weaknesses

9.7 Lenovo Group Limited

9.7.1 Lenovo Group Limited Details

9.7.2 Lenovo Group Limited Major Business

9.7.3 Lenovo Group Limited eSIM Device Product and Services

9.7.4 Lenovo Group Limited eSIM Device Revenue, Gross Margin and Market Share

(2021-2026)

9.7.5 Lenovo Group Limited Recent Developments/Updates

9.7.6 Lenovo Group Limited Competitive Strengths & Weaknesses

9.8 Huawei Technologies Co., Ltd.

9.8.1 Huawei Technologies Co., Ltd. Details

9.8.2 Huawei Technologies Co., Ltd. Major Business

9.8.3 Huawei Technologies Co., Ltd. eSIM Device Product and Services

9.8.4 Huawei Technologies Co., Ltd. eSIM Device Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 Huawei Technologies Co., Ltd. Recent Developments/Updates

9.8.6 Huawei Technologies Co., Ltd. Competitive Strengths & Weaknesses

9.9 Xiaomi Corporation

9.9.1 Xiaomi Corporation Details

9.9.2 Xiaomi Corporation Major Business

9.9.3 Xiaomi Corporation eSIM Device Product and Services

9.9.4 Xiaomi Corporation eSIM Device Revenue, Gross Margin and Market Share

(2021-2026)

9.9.5 Xiaomi Corporation Recent Developments/Updates

9.9.6 Xiaomi Corporation Competitive Strengths & Weaknesses

9.10 OPPO Guangdong Mobile Telecommunications Corp., Ltd.

9.10.1 OPPO Guangdong Mobile Telecommunications Corp., Ltd. Details

9.10.2 OPPO Guangdong Mobile Telecommunications Corp., Ltd. Major Business

9.10.3 OPPO Guangdong Mobile Telecommunications Corp., Ltd. eSIM Device Product and Services

9.10.4 OPPO Guangdong Mobile Telecommunications Corp., Ltd. eSIM Device Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 OPPO Guangdong Mobile Telecommunications Corp., Ltd. Recent Developments/Updates

9.10.6 OPPO Guangdong Mobile Telecommunications Corp., Ltd. Competitive Strengths & Weaknesses

9.11 Sony Corporation

9.11.1 Sony Corporation Details

9.11.2 Sony Corporation Major Business

9.11.3 Sony Corporation eSIM Device Product and Services

9.11.4 Sony Corporation eSIM Device Revenue, Gross Margin and Market Share

(2021-2026)

9.11.5 Sony Corporation Recent Developments/Updates

9.11.6 Sony Corporation Competitive Strengths & Weaknesses

9.12 HMD Global Oy

- 9.12.1 HMD Global Oy Details
- 9.12.2 HMD Global Oy Major Business
- 9.12.3 HMD Global Oy eSIM Device Product and Services
- 9.12.4 HMD Global Oy eSIM Device Revenue, Gross Margin and Market Share
(2021-2026)
- 9.12.5 HMD Global Oy Recent Developments/Updates
- 9.12.6 HMD Global Oy Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 eSIM Device Industry Chain
- 10.2 eSIM Device Upstream Analysis
- 10.3 eSIM Device Midstream Analysis
- 10.4 eSIM Device Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World eSIM Device Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World eSIM Device Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World eSIM Device Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World eSIM Device Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World eSIM Device Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World eSIM Device Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World eSIM Device Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World eSIM Device Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World eSIM Device Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key eSIM Device Players in 2025

Table 12. World eSIM Device Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global eSIM Device Company Evaluation Quadrant

Table 14. Head Office of Key eSIM Device Players

Table 15. eSIM Device Market: Company Product Type Footprint

Table 16. eSIM Device Market: Company Product Application Footprint

Table 17. eSIM Device Mergers & Acquisitions Activity

Table 18. United States VS China eSIM Device Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China eSIM Device Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based eSIM Device Companies, Headquarters (States, Country)

Table 21. United States Based Companies eSIM Device Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies eSIM Device Revenue Market Share

(2021-2026)

Table 23. China Based eSIM Device Companies, Headquarters (Province, Country)

Table 24. China Based Companies eSIM Device Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies eSIM Device Revenue Market Share (2021-2026)

Table 26. Rest of World Based eSIM Device Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies eSIM Device Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies eSIM Device Revenue Market Share (2021-2026)

Table 29. World eSIM Device Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World eSIM Device Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World eSIM Device Market Size by Type (2027-2032) & (USD Million)

Table 32. World eSIM Device Market Size by Primary Cellular Network Capability, (USD Million), 2021 & 2025 & 2032

Table 33. World eSIM Device Market Size Value by Primary Cellular Network Capability (2021-2026) & (USD Million)

Table 34. World eSIM Device Market Size by Primary Cellular Network Capability (2027-2032) & (USD Million)

Table 35. World eSIM Device Market Size by Device Selling Price, (USD Million), 2021 & 2025 & 2032

Table 36. World eSIM Device Market Size Value by Device Selling Price (2021-2026) & (USD Million)

Table 37. World eSIM Device Market Size by Device Selling Price (2027-2032) & (USD Million)

Table 38. World eSIM Device Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World eSIM Device Market Size by Application (2021-2026) & (USD Million)

Table 40. World eSIM Device Market Size by Application (2027-2032) & (USD Million)

Table 41. Apple Inc. Basic Information, Manufacturing Base and Competitors

Table 42. Apple Inc. Major Business

Table 43. Apple Inc. eSIM Device Product and Services

Table 44. Apple Inc. eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Apple Inc. Recent Developments/Updates

Table 46. Apple Inc. Competitive Strengths & Weaknesses

Table 47. Samsung Electronics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 48. Samsung Electronics Co., Ltd. Major Business

Table 49. Samsung Electronics Co., Ltd. eSIM Device Product and Services
Table 50. Samsung Electronics Co., Ltd. eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Samsung Electronics Co., Ltd. Recent Developments/Updates
Table 52. Samsung Electronics Co., Ltd. Competitive Strengths & Weaknesses
Table 53. Google LLC Basic Information, Manufacturing Base and Competitors
Table 54. Google LLC Major Business
Table 55. Google LLC eSIM Device Product and Services
Table 56. Google LLC eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. Google LLC Recent Developments/Updates
Table 58. Google LLC Competitive Strengths & Weaknesses
Table 59. Motorola Mobility LLC Basic Information, Manufacturing Base and Competitors
Table 60. Motorola Mobility LLC Major Business
Table 61. Motorola Mobility LLC eSIM Device Product and Services
Table 62. Motorola Mobility LLC eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Motorola Mobility LLC Recent Developments/Updates
Table 64. Motorola Mobility LLC Competitive Strengths & Weaknesses
Table 65. Microsoft Corporation Basic Information, Manufacturing Base and Competitors
Table 66. Microsoft Corporation Major Business
Table 67. Microsoft Corporation eSIM Device Product and Services
Table 68. Microsoft Corporation eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Microsoft Corporation Recent Developments/Updates
Table 70. Microsoft Corporation Competitive Strengths & Weaknesses
Table 71. HP Inc. Basic Information, Manufacturing Base and Competitors
Table 72. HP Inc. Major Business
Table 73. HP Inc. eSIM Device Product and Services
Table 74. HP Inc. eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. HP Inc. Recent Developments/Updates
Table 76. HP Inc. Competitive Strengths & Weaknesses
Table 77. Lenovo Group Limited Basic Information, Manufacturing Base and Competitors
Table 78. Lenovo Group Limited Major Business
Table 79. Lenovo Group Limited eSIM Device Product and Services

Table 80. Lenovo Group Limited eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Lenovo Group Limited Recent Developments/Updates

Table 82. Lenovo Group Limited Competitive Strengths & Weaknesses

Table 83. Huawei Technologies Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 84. Huawei Technologies Co., Ltd. Major Business

Table 85. Huawei Technologies Co., Ltd. eSIM Device Product and Services

Table 86. Huawei Technologies Co., Ltd. eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. Huawei Technologies Co., Ltd. Recent Developments/Updates

Table 88. Huawei Technologies Co., Ltd. Competitive Strengths & Weaknesses

Table 89. Xiaomi Corporation Basic Information, Manufacturing Base and Competitors

Table 90. Xiaomi Corporation Major Business

Table 91. Xiaomi Corporation eSIM Device Product and Services

Table 92. Xiaomi Corporation eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. Xiaomi Corporation Recent Developments/Updates

Table 94. Xiaomi Corporation Competitive Strengths & Weaknesses

Table 95. OPPO Guangdong Mobile Telecommunications Corp., Ltd. Basic Information, Manufacturing Base and Competitors

Table 96. OPPO Guangdong Mobile Telecommunications Corp., Ltd. Major Business

Table 97. OPPO Guangdong Mobile Telecommunications Corp., Ltd. eSIM Device Product and Services

Table 98. OPPO Guangdong Mobile Telecommunications Corp., Ltd. eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. OPPO Guangdong Mobile Telecommunications Corp., Ltd. Recent Developments/Updates

Table 100. OPPO Guangdong Mobile Telecommunications Corp., Ltd. Competitive Strengths & Weaknesses

Table 101. Sony Corporation Basic Information, Manufacturing Base and Competitors

Table 102. Sony Corporation Major Business

Table 103. Sony Corporation eSIM Device Product and Services

Table 104. Sony Corporation eSIM Device Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 105. Sony Corporation Recent Developments/Updates

Table 106. Sony Corporation Competitive Strengths & Weaknesses

Table 107. HMD Global Oy Basic Information, Manufacturing Base and Competitors

Table 108. HMD Global Oy Major Business

Table 109. HMD Global Oy eSIM Device Product and Services

Table 110. HMD Global Oy eSIM Device Revenue, Gross Margin and Market Share
(2021-2026) & (USD Million)

Table 111. HMD Global Oy Recent Developments/Updates

Table 112. HMD Global Oy Competitive Strengths & Weaknesses

Table 113. Global Key Players of eSIM Device Upstream (Raw Materials)

Table 114. Global eSIM Device Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. eSIM Device Picture

Figure 2. World eSIM Device Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World eSIM Device Total Revenue (2021-2032) & (USD Million)

Figure 4. World eSIM Device Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World eSIM Device Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company eSIM Device Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company eSIM Device Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company eSIM Device Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company eSIM Device Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company eSIM Device Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company eSIM Device Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company eSIM Device Revenue (2021-2032) & (USD Million)

Figure 13. eSIM Device Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 16. World eSIM Device Consumption Value Market Share by Region (2021-2032)

Figure 17. United States eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 18. China eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 23. India eSIM Device Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of eSIM Device by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for eSIM Device Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for eSIM Device Markets in 2025

Figure 27. United States VS China: eSIM Device Revenue Market Share Comparison

(2021 & 2025 & 2032)

Figure 28. United States VS China: eSIM Device Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World eSIM Device Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World eSIM Device Market Size Market Share by Type in 2025

Figure 31. eSIM Smartphones

Figure 32. eSIM Tablets

Figure 33. eSIM Smartwatches and Wearables

Figure 34. eSIM Laptops and 2-in-1 PCs

Figure 35. Others

Figure 36. World eSIM Device Market Size Market Share by Type (2021-2032)

Figure 37. World eSIM Device Market Size by Primary Cellular Network Capability, (USD Million), 2021 & 2025 & 2032

Figure 38. World eSIM Device Market Size Market Share by Primary Cellular Network Capability in 2025

Figure 39. LPWA eSIM Devices Based on NB-IoT or LTE-M

Figure 40. 4G LTE eSIM Devices from LTE Cat 1 to Cat 20

Figure 41. 5G NSA and SA eSIM Devices

Figure 42. Others

Figure 43. World eSIM Device Market Size Market Share by Primary Cellular Network Capability (2021-2032)

Figure 44. World eSIM Device Market Size by Device Selling Price, (USD Million), 2021 & 2025 & 2032

Figure 45. World eSIM Device Market Size Market Share by Device Selling Price in 2025

Figure 46. Entry-Level eSIM Devices Below US\$200

Figure 47. Mid-Range eSIM Devices from US\$200 to US\$499

Figure 48. Premium eSIM Devices from US\$500 to US\$999

Figure 49. High-End and Specialized eSIM Devices at US\$1,000 and Above

Figure 50. World eSIM Device Market Size Market Share by Device Selling Price (2021-2032)

Figure 51. World eSIM Device Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 52. World eSIM Device Market Size Market Share by Application in 2025

Figure 53. Personal Mobile Communications

Figure 54. International Travel and Roaming

Figure 55. Enterprise Mobility and Remote Work

Figure 56. Connected Wearables

Figure 57. Connected Vehicles and Telematics

Figure 58. Industrial IoT and Smart Manufacturing

Figure 59. Others

Figure 60. World eSIM Device Market Size Market Share by Application (2021-2032)

Figure 61. eSIM Device Industrial Chain

Figure 62. Methodology

Figure 63. Research Process and Data Source

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