

Global iSIM Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global iSIM Module market size is expected to reach \$ 837 million by 2032, rising at a market growth of 30.5% CAGR during the forecast period (2026-2032).

iSIM-enabled cellular IoT modules are cellular communication modules that integrate SIM functionality into the module's cellular SoC, secure enclave or integrated tamper-resistant element, enabling network authentication and remote provisioning without a removable SIM card or a separate soldered eSIM chip. These modules are mainly used in low-power IoT devices such as smart meters, asset trackers, POS terminals, wearables, industrial sensors, agriculture devices, healthcare devices and smart-city endpoints.

iSIM-enabled cellular IoT modules represent the next step in the evolution of device identity for connected products. Unlike removable SIM cards or soldered eSIM chips, iSIM integrates SIM functionality directly into the device processor, secure enclave or cellular SoC environment, allowing devices to connect to mobile networks without a separate SIM component. This creates clear value for IoT devices where space, cost, power consumption, manufacturing simplicity and tamper resistance are important design considerations. The benefit is especially relevant for compact, battery-powered and long-lifecycle devices such as smart meters, asset trackers, POS terminals, wearables, healthcare devices, industrial sensors and smart-city endpoints.

From the demand side, iSIM module adoption is likely to start from low-power cellular IoT rather than high-end consumer or broadband devices. NB-IoT, LTE-M and dual-mode LPWA modules are the most natural early categories because these products are highly sensitive to bill-of-material cost, PCB area, battery life, logistics complexity and global SKU management. For device OEMs, iSIM can reduce the need for SIM card

slots, SIM trays, separate eSIM chips and manual SIM handling during manufacturing. For operators and connectivity providers, iSIM also supports a more scalable remote provisioning model, which is useful for large fleets of devices deployed across multiple countries and networks.

The supply structure is ecosystem-driven. Module vendors such as Quectel, Murata and Telit Cinterion are the most visible hardware suppliers with clear iSIM-related module evidence. Quectel's BG773A-GL has been positioned as an iSIM module enabled with Kigen iSIM OS, Murata lists Type 1SC-iSIM as an iSIM LPWA module, and G+D has qualified its iSIM OS on a Telit Cinterion NE310L2 NB-IoT module. However, these module makers do not operate alone. iSIM commercialization depends on cellular chipsets, secure operating systems, remote provisioning infrastructure, mobile operators, MVNOs and device OEMs. This means that the competitive landscape should not be analyzed only as a module hardware market; it is a multi-layer ecosystem involving hardware, security credentials, connectivity management and lifecycle services.

The key competitive barrier is not simply whether a module can technically support iSIM. Suppliers must prove secure personalization, operator compatibility, standards compliance, provisioning reliability, manufacturing scalability and long-term field support. Security OS vendors such as Kigen, Giesecke+Devrient and Thales are critical ecosystem participants, but they should not be counted as module manufacturers under a narrow hardware market definition. Similarly, chipset vendors and connectivity service providers are important enablers.

Looking ahead, iSIM modules are expected to coexist with eSIM modules for an extended period. eSIM is already established in many cellular IoT and consumer devices, while iSIM still needs broader operator readiness, certification maturity and OEM confidence. The strongest near-term growth opportunities will come from high-volume IoT categories that require small form factor, low power, remote activation and simplified global deployment. Over time, iSIM is likely to expand from NB-IoT and LTE-M into Cat 1 bis, RedCap and selected satellite or NTN IoT modules, but adoption will depend on whether the ecosystem can deliver secure provisioning, interoperability and clear total-cost-of-ownership advantages over conventional SIM and eSIM designs.

This report studies the global iSIM Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for iSIM

Module 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 iSIM Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global iSIM Module total production and demand, 2021-2032, (K Pcs)

Global iSIM Module total production value, 2021-2032, (USD Million)

Global iSIM Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global iSIM Module consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: iSIM Module domestic production, consumption, key domestic manufacturers and share

Global iSIM Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global iSIM Module production by Cellular Release / Network Readiness, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global iSIM Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global iSIM Module market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Quectel Wireless Solutions Co., Ltd., Murata Manufacturing Co., Ltd., Telit Cinterion, 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 iSIM Module market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) by manufacturer, by Cellular Release / Network Readiness, 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 iSIM Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global iSIM Module Market, Segmentation by Cellular Release / Network Readiness:

Release 13 / 14 LPWA-ready Modules

Release 15 / 16 Enhanced LPWA Modules

LTE Cat 1 / Cat 1 bis Ready Modules

Release 17 RedCap / NTN-ready Modules

Global iSIM Module Market, Segmentation by Cellular Technology:

NB-IoT iSIM Modules

LTE-M / Cat-M iSIM Modules

Dual-mode LTE-M / NB-IoT iSIM Modules

Cat 1 / Cat 1 bis iSIM Modules

5G RedCap / NTN iSIM-ready Modules

Global iSIM Module Market, Segmentation by Product Integration Level:

iSIM-ready Cellular Modules

iSIM-enabled Modules with SIM OS

Pre-provisioned iSIM Modules

iSIM Modules with Connectivity Bundle

Development / Evaluation iSIM Modules

Global iSIM Module Market, Segmentation by Application:

Smart Metering

Asset Tracking and Logistics

POS and Payment Terminals

Wearables and Healthcare Devices

Industrial Sensors and Automation

Smart City and Utilities

Agriculture and Environmental Monitoring

Companies Profiled:

Quectel Wireless Solutions Co., Ltd.

Murata Manufacturing Co., Ltd.

Telit Cinterion

Key Questions Answered:

1. How big is the global iSIM Module market?
2. What is the demand of the global iSIM Module market?
3. What is the year over year growth of the global iSIM Module market?
4. What is the production and production value of the global iSIM Module market?
5. Who are the key producers in the global iSIM Module market?
6. What are the growth factors driving the market demand?

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