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Global iSIM Module Market Growth 2026-2032

https://marketpublishers.com/r/G90C043DD981EN.html
Date: October 2026
Pages: 83
Price: US$ 3,660.00 (Single User License)
ID: G90C043DD981EN

Abstracts

The global iSIM Module market size is predicted to grow from US$ 92.93 million in 2025 to US$ 868 million in 2032; it is expected to grow at a CAGR of 32.4% from 2026 to 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.

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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.

LP Information, Inc. (LPI) ' newest research report, the "iSIM Module Industry Forecast" looks at past sales and reviews total world iSIM Module sales in 2025, providing a comprehensive analysis by region and market sector of projected iSIM Module sales for 2026 through 2032. With iSIM Module sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world iSIM

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Module industry.

This Insight Report provides a comprehensive analysis of the global iSIM Module landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on iSIM Module portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global iSIM Module market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for iSIM Module and breaks down the forecast by Cellular Release / Network Readiness, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global iSIM Module.

This report presents a comprehensive overview, market shares, and growth opportunities of iSIM Module market by product type, application, key manufacturers and key regions and countries.

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

Segmentation by Cellular Technology:

NB-IoT iSIM Modules

LTE-M / Cat-M iSIM Modules

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

Cat 1 / Cat 1 bis iSIM Modules

5G RedCap / NTN iSIM-ready Modules

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

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

This report also splits the market by region:

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- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt

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South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Quectel Wireless Solutions Co., Ltd.

Murata Manufacturing Co., Ltd.

Telit Cinterion

Key Questions Addressed in this Report

What is the 10-year outlook for the global iSIM Module market?

What factors are driving iSIM Module market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do iSIM Module market opportunities vary by end market size?

How does iSIM Module break out by Cellular Release / Network Readiness, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global iSIM Module Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for iSIM Module by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for iSIM Module by Country/Region, 2021, 2025 & 2032
2.2 iSIM Module Segment by Cellular Release / Network Readiness
  2.2.1 Release 13 / 14 LPWA-ready Modules
  2.2.2 Release 15 / 16 Enhanced LPWA Modules
  2.2.3 LTE Cat 1 / Cat 1 bis Ready Modules
  2.2.4 Release 17 RedCap / NTN-ready Modules
  2.2.5 iSIM Module Sales by Cellular Release / Network Readiness
    2.2.5.1 Global iSIM Module Sales Market Share by Cellular Release / Network Readiness (2021-2026)
    2.2.5.2 Global iSIM Module Revenue and Market Share by Cellular Release / Network Readiness (2021-2026)
    2.2.5.3 Global iSIM Module Sale Price by Cellular Release / Network Readiness (2021-2026)
2.3 iSIM Module Segment by Cellular Technology
  2.3.1 NB-IoT iSIM Modules
  2.3.2 LTE-M / Cat-M iSIM Modules
  2.3.3 Dual-mode LTE-M / NB-IoT iSIM Modules
  2.3.4 Cat 1 / Cat 1 bis iSIM Modules
  2.3.5 5G RedCap / NTN iSIM-ready Modules

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2.3.6 iSIM Module Sales by Cellular Technology
2.3.6.1 Global iSIM Module Sales Market Share by Cellular Technology (2021-2026)
2.3.6.2 Global iSIM Module Revenue and Market Share by Cellular Technology (2021-2026)
2.3.6.3 Global iSIM Module Sale Price by Cellular Technology (2021-2026)
2.4 iSIM Module Segment by Product Integration Level
2.4.1 iSIM-ready Cellular Modules
2.4.2 iSIM-enabled Modules with SIM OS
2.4.3 Pre-provisioned iSIM Modules
2.4.4 iSIM Modules with Connectivity Bundle
2.4.5 Development / Evaluation iSIM Modules
2.4.6 iSIM Module Sales by Product Integration Level
2.4.6.1 Global iSIM Module Sales Market Share by Product Integration Level (2021-2026)
2.4.6.2 Global iSIM Module Revenue and Market Share by Product Integration Level (2021-2026)
2.4.6.3 Global iSIM Module Sale Price by Product Integration Level (2021-2026)
2.5 iSIM Module Segment by Application
2.5.1 Smart Metering
2.5.2 Asset Tracking and Logistics
2.5.3 POS and Payment Terminals
2.5.4 Wearables and Healthcare Devices
2.5.5 Industrial Sensors and Automation
2.5.6 Smart City and Utilities
2.5.7 Agriculture and Environmental Monitoring
2.5.8 iSIM Module Sales by Application
2.5.8.1 Global iSIM Module Sale Market Share by Application (2021-2026)
2.5.8.2 Global iSIM Module Revenue and Market Share by Application (2021-2026)
2.5.8.3 Global iSIM Module Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global iSIM Module Breakdown Data by Company
3.1.1 Global iSIM Module Annual Sales by Company (2021-2026)
3.1.2 Global iSIM Module Sales Market Share by Company (2021-2026)
3.2 Global iSIM Module Annual Revenue by Company (2021-2026)
3.2.1 Global iSIM Module Revenue by Company (2021-2026)
3.2.2 Global iSIM Module Revenue Market Share by Company (2021-2026)
3.3 Global iSIM Module Sale Price by Company

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info@marketpublishers.com

3.4 Key Manufacturers iSIM Module Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers iSIM Module Product Location Distribution
3.4.2 Players iSIM Module Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ISIM MODULE BY GEOGRAPHIC REGION

4.1 World Historic iSIM Module Market Size by Geographic Region (2021-2026)
4.1.1 Global iSIM Module Annual Sales by Geographic Region (2021-2026)
4.1.2 Global iSIM Module Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic iSIM Module Market Size by Country/Region (2021-2026)
4.2.1 Global iSIM Module Annual Sales by Country/Region (2021-2026)
4.2.2 Global iSIM Module Annual Revenue by Country/Region (2021-2026)
4.3 Americas iSIM Module Sales Growth
4.4 APAC iSIM Module Sales Growth
4.5 Europe iSIM Module Sales Growth
4.6 Middle East & Africa iSIM Module Sales Growth

5 AMERICAS

5.1 Americas iSIM Module Sales by Country
5.1.1 Americas iSIM Module Sales by Country (2021-2026)
5.1.2 Americas iSIM Module Revenue by Country (2021-2026)
5.2 Americas iSIM Module Sales by Cellular Release / Network Readiness (2021-2026)
5.3 Americas iSIM Module Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC iSIM Module Sales by Region
6.1.1 APAC iSIM Module Sales by Region (2021-2026)

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6.1.2 APAC iSIM Module Revenue by Region (2021-2026)
6.2 APAC iSIM Module Sales by Cellular Release / Network Readiness (2021-2026)
6.3 APAC iSIM Module Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe iSIM Module by Country
7.1.1 Europe iSIM Module Sales by Country (2021-2026)
7.1.2 Europe iSIM Module Revenue by Country (2021-2026)
7.2 Europe iSIM Module Sales by Cellular Release / Network Readiness (2021-2026)
7.3 Europe iSIM Module Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa iSIM Module by Country
8.1.1 Middle East & Africa iSIM Module Sales by Country (2021-2026)
8.1.2 Middle East & Africa iSIM Module Revenue by Country (2021-2026)
8.2 Middle East & Africa iSIM Module Sales by Cellular Release / Network Readiness (2021-2026)
8.3 Middle East & Africa iSIM Module Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

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9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of iSIM Module
10.3 Manufacturing Process Analysis of iSIM Module
10.4 Industry Chain Structure of iSIM Module

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 iSIM Module Distributors
11.3 iSIM Module Customer

12 WORLD FORECAST REVIEW FOR ISIM MODULE BY GEOGRAPHIC REGION

12.1 Global iSIM Module Market Size Forecast by Region
  12.1.1 Global iSIM Module Forecast by Region (2027-2032)
  12.1.2 Global iSIM Module Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global iSIM Module Forecast by Cellular Release / Network Readiness (2027-2032)
12.7 Global iSIM Module Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Quectel Wireless Solutions Co., Ltd.
  13.1.1 Quectel Wireless Solutions Co., Ltd. Company Information
  13.1.2 Quectel Wireless Solutions Co., Ltd. iSIM Module Product Portfolios and Specifications

+357 96 030922
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13.1.3 Quectel Wireless Solutions Co., Ltd. iSIM Module Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Quectel Wireless Solutions Co., Ltd. Main Business Overview
13.1.5 Quectel Wireless Solutions Co., Ltd. Latest Developments
13.2 Murata Manufacturing Co., Ltd.
13.2.1 Murata Manufacturing Co., Ltd. Company Information
13.2.2 Murata Manufacturing Co., Ltd. iSIM Module Product Portfolios and Specifications
13.2.3 Murata Manufacturing Co., Ltd. iSIM Module Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Murata Manufacturing Co., Ltd. Main Business Overview
13.2.5 Murata Manufacturing Co., Ltd. Latest Developments
13.3 Telit Cinterion
13.3.1 Telit Cinterion Company Information
13.3.2 Telit Cinterion iSIM Module Product Portfolios and Specifications
13.3.3 Telit Cinterion iSIM Module Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Telit Cinterion Main Business Overview
13.3.5 Telit Cinterion Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. iSIM Module Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. iSIM Module Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Release 13 / 14 LPWA-ready Modules
Table 4. Major Players of Release 15 / 16 Enhanced LPWA Modules
Table 5. Major Players of LTE Cat 1 / Cat 1 bis Ready Modules
Table 6. Major Players of Release 17 RedCap / NTN-ready Modules
Table 7. Global iSIM Module Sales by Cellular Release / Network Readiness (2021-2026) & (K Pcs)
Table 8. Global iSIM Module Sales Market Share by Cellular Release / Network Readiness (2021-2026)
Table 9. Global iSIM Module Revenue by Cellular Release / Network Readiness (2021-2026) & ($ million)
Table 10. Global iSIM Module Revenue Market Share by Cellular Release / Network Readiness (2021-2026)
Table 11. Global iSIM Module Sale Price by Cellular Release / Network Readiness (2021-2026) & (US$/Pcs)
Table 12. Major Players of NB-IoT iSIM Modules
Table 13. Major Players of LTE-M / Cat-M iSIM Modules
Table 14. Major Players of Dual-mode LTE-M / NB-IoT iSIM Modules
Table 15. Major Players of Cat 1 / Cat 1 bis iSIM Modules
Table 16. Major Players of 5G RedCap / NTN iSIM-ready Modules
Table 17. Global iSIM Module Sales by Cellular Technology (2021-2026) & (K Pcs)
Table 18. Global iSIM Module Sales Market Share by Cellular Technology (2021-2026)
Table 19. Global iSIM Module Revenue by Cellular Technology (2021-2026) & ($ million)
Table 20. Global iSIM Module Revenue Market Share by Cellular Technology (2021-2026)
Table 21. Global iSIM Module Sale Price by Cellular Technology (2021-2026) & (US$/Pcs)
Table 22. Major Players of iSIM-ready Cellular Modules
Table 23. Major Players of iSIM-enabled Modules with SIM OS
Table 24. Major Players of Pre-provisioned iSIM Modules
Table 25. Major Players of iSIM Modules with Connectivity Bundle

+357 96 030922
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Table 26. Major Players of Development / Evaluation iSIM Modules
Table 27. Global iSIM Module Sales by Product Integration Level (2021-2026) & (K Pcs)
Table 28. Global iSIM Module Sales Market Share by Product Integration Level (2021-2026)
Table 29. Global iSIM Module Revenue by Product Integration Level (2021-2026) & ($ million)
Table 30. Global iSIM Module Revenue Market Share by Product Integration Level (2021-2026)
Table 31. Global iSIM Module Sale Price by Product Integration Level (2021-2026) & (US$/Pcs)
Table 32. Global iSIM Module Sale by Application (2021-2026) & (K Pcs)
Table 33. Global iSIM Module Sale Market Share by Application (2021-2026)
Table 34. Global iSIM Module Revenue by Application (2021-2026) & ($ million)
Table 35. Global iSIM Module Revenue Market Share by Application (2021-2026)
Table 36. Global iSIM Module Sale Price by Application (2021-2026) & (US$/Pcs)
Table 37. Global iSIM Module Sales by Company (2021-2026) & (K Pcs)
Table 38. Global iSIM Module Sales Market Share by Company (2021-2026)
Table 39. Global iSIM Module Revenue by Company (2021-2026) & ($ millions)
Table 40. Global iSIM Module Revenue Market Share by Company (2021-2026)
Table 41. Global iSIM Module Sale Price by Company (2021-2026) & (US$/Pcs)
Table 42. Key Manufacturers iSIM Module Producing Area Distribution and Sales Area
Table 43. Players iSIM Module Products Offered
Table 44. iSIM Module Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 45. New Products and Potential Entrants
Table 46. Market M&A Activity & Strategy
Table 47. Global iSIM Module Sales by Geographic Region (2021-2026) & (K Pcs)
Table 48. Global iSIM Module Sales Market Share Geographic Region (2021-2026)
Table 49. Global iSIM Module Revenue by Geographic Region (2021-2026) & ($ millions)
Table 50. Global iSIM Module Revenue Market Share by Geographic Region (2021-2026)
Table 51. Global iSIM Module Sales by Country/Region (2021-2026) & (K Pcs)
Table 52. Global iSIM Module Sales Market Share by Country/Region (2021-2026)
Table 53. Global iSIM Module Revenue by Country/Region (2021-2026) & ($ millions)
Table 54. Global iSIM Module Revenue Market Share by Country/Region (2021-2026)
Table 55. Americas iSIM Module Sales by Country (2021-2026) & (K Pcs)
Table 56. Americas iSIM Module Sales Market Share by Country (2021-2026)
Table 57. Americas iSIM Module Revenue by Country (2021-2026) & ($ millions)
Table 58. Americas iSIM Module Sales by Cellular Release / Network Readiness

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info@marketpublishers.com

(2021-2026) & (K Pcs)
Table 59. Americas iSIM Module Sales by Application (2021-2026) & (K Pcs)
Table 60. APAC iSIM Module Sales by Region (2021-2026) & (K Pcs)
Table 61. APAC iSIM Module Sales Market Share by Region (2021-2026)
Table 62. APAC iSIM Module Revenue by Region (2021-2026) & ($ millions)
Table 63. APAC iSIM Module Sales by Cellular Release / Network Readiness (2021-2026) & (K Pcs)
Table 64. APAC iSIM Module Sales by Application (2021-2026) & (K Pcs)
Table 65. Europe iSIM Module Sales by Country (2021-2026) & (K Pcs)
Table 66. Europe iSIM Module Revenue by Country (2021-2026) & ($ millions)
Table 67. Europe iSIM Module Sales by Cellular Release / Network Readiness (2021-2026) & (K Pcs)
Table 68. Europe iSIM Module Sales by Application (2021-2026) & (K Pcs)
Table 69. Middle East & Africa iSIM Module Sales by Country (2021-2026) & (K Pcs)
Table 70. Middle East & Africa iSIM Module Revenue Market Share by Country (2021-2026)
Table 71. Middle East & Africa iSIM Module Sales by Cellular Release / Network Readiness (2021-2026) & (K Pcs)
Table 72. Middle East & Africa iSIM Module Sales by Application (2021-2026) & (K Pcs)
Table 73. Key Market Drivers & Growth Opportunities of iSIM Module
Table 74. Key Market Challenges & Risks of iSIM Module
Table 75. Key Industry Trends of iSIM Module
Table 76. iSIM Module Raw Material
Table 77. Key Suppliers of Raw Materials
Table 78. iSIM Module Distributors List
Table 79. iSIM Module Customer List
Table 80. Global iSIM Module Sales Forecast by Region (2027-2032) & (K Pcs)
Table 81. Global iSIM Module Revenue Forecast by Region (2027-2032) & ($ millions)
Table 82. Americas iSIM Module Sales Forecast by Country (2027-2032) & (K Pcs)
Table 83. Americas iSIM Module Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. APAC iSIM Module Sales Forecast by Region (2027-2032) & (K Pcs)
Table 85. APAC iSIM Module Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 86. Europe iSIM Module Sales Forecast by Country (2027-2032) & (K Pcs)
Table 87. Europe iSIM Module Revenue Forecast by Country (2027-2032) & ($ millions)
Table 88. Middle East & Africa iSIM Module Sales Forecast by Country (2027-2032) & (K Pcs)
Table 89. Middle East & Africa iSIM Module Revenue Forecast by Country (2027-2032)

+357 96 030922
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& ($ millions)
Table 90. Global iSIM Module Sales Forecast by Cellular Release / Network Readiness (2027-2032) & (K Pcs)
Table 91. Global iSIM Module Revenue Forecast by Cellular Release / Network Readiness (2027-2032) & ($ millions)
Table 92. Global iSIM Module Sales Forecast by Application (2027-2032) & (K Pcs)
Table 93. Global iSIM Module Revenue Forecast by Application (2027-2032) & ($ millions)
Table 94. Quectel Wireless Solutions Co., Ltd. Basic Information, iSIM Module Manufacturing Base, Sales Area and Its Competitors
Table 95. Quectel Wireless Solutions Co., Ltd. iSIM Module Product Portfolios and Specifications
Table 96. Quectel Wireless Solutions Co., Ltd. iSIM Module Sales (K Pcs), Revenue ($ Million), Price (US$/Pcs) and Gross Margin (2021-2026)
Table 97. Quectel Wireless Solutions Co., Ltd. Main Business
Table 98. Quectel Wireless Solutions Co., Ltd. Latest Developments
Table 99. Murata Manufacturing Co., Ltd. Basic Information, iSIM Module Manufacturing Base, Sales Area and Its Competitors
Table 100. Murata Manufacturing Co., Ltd. iSIM Module Product Portfolios and Specifications
Table 101. Murata Manufacturing Co., Ltd. iSIM Module Sales (K Pcs), Revenue ($ Million), Price (US$/Pcs) and Gross Margin (2021-2026)
Table 102. Murata Manufacturing Co., Ltd. Main Business
Table 103. Murata Manufacturing Co., Ltd. Latest Developments
Table 104. Telit Cinterion Basic Information, iSIM Module Manufacturing Base, Sales Area and Its Competitors
Table 105. Telit Cinterion iSIM Module Product Portfolios and Specifications
Table 106. Telit Cinterion iSIM Module Sales (K Pcs), Revenue ($ Million), Price (US$/Pcs) and Gross Margin (2021-2026)
Table 107. Telit Cinterion Main Business
Table 108. Telit Cinterion Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of iSIM Module
Figure 2. iSIM Module Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global iSIM Module Sales Growth Rate 2021-2032 (K Pcs)
Figure 7. Global iSIM Module Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. iSIM Module Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. iSIM Module Sales Market Share by Country/Region (2025)
Figure 10. iSIM Module Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Release 13 / 14 LPWA-ready Modules
Figure 12. Product Picture of Release 15 / 16 Enhanced LPWA Modules
Figure 13. Product Picture of LTE Cat 1 / Cat 1 bis Ready Modules
Figure 14. Product Picture of Release 17 RedCap / NTN-ready Modules
Figure 15. Global iSIM Module Sales Market Share by Cellular Release / Network Readiness in 2026
Figure 16. Global iSIM Module Revenue Market Share by Cellular Release / Network Readiness (2021-2026)
Figure 17. Product Picture of NB-IoT iSIM Modules
Figure 18. Product Picture of LTE-M / Cat-M iSIM Modules
Figure 19. Product Picture of Dual-mode LTE-M / NB-IoT iSIM Modules
Figure 20. Product Picture of Cat 1 / Cat 1 bis iSIM Modules
Figure 21. Product Picture of 5G RedCap / NTN iSIM-ready Modules
Figure 22. Global iSIM Module Sales Market Share by Cellular Technology in 2026
Figure 23. Global iSIM Module Revenue Market Share by Cellular Technology (2021-2026)
Figure 24. Product Picture of iSIM-ready Cellular Modules
Figure 25. Product Picture of iSIM-enabled Modules with SIM OS
Figure 26. Product Picture of Pre-provisioned iSIM Modules
Figure 27. Product Picture of iSIM Modules with Connectivity Bundle
Figure 28. Product Picture of Development / Evaluation iSIM Modules
Figure 29. Global iSIM Module Sales Market Share by Product Integration Level in 2026
Figure 30. Global iSIM Module Revenue Market Share by Product Integration Level (2021-2026)
Figure 31. iSIM Module Consumed in Smart Metering

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Figure 32. Global iSIM Module Market: Smart Metering (2021-2026) & (K Pcs)
Figure 33. iSIM Module Consumed in Asset Tracking and Logistics
Figure 34. Global iSIM Module Market: Asset Tracking and Logistics (2021-2026) & (K Pcs)
Figure 35. iSIM Module Consumed in POS and Payment Terminals
Figure 36. Global iSIM Module Market: POS and Payment Terminals (2021-2026) & (K Pcs)
Figure 37. iSIM Module Consumed in Wearables and Healthcare Devices
Figure 38. Global iSIM Module Market: Wearables and Healthcare Devices (2021-2026) & (K Pcs)
Figure 39. iSIM Module Consumed in Industrial Sensors and Automation
Figure 40. Global iSIM Module Market: Industrial Sensors and Automation (2021-2026) & (K Pcs)
Figure 41. iSIM Module Consumed in Smart City and Utilities
Figure 42. Global iSIM Module Market: Smart City and Utilities (2021-2026) & (K Pcs)
Figure 43. iSIM Module Consumed in Agriculture and Environmental Monitoring
Figure 44. Global iSIM Module Market: Agriculture and Environmental Monitoring (2021-2026) & (K Pcs)
Figure 45. Global iSIM Module Sale Market Share by Application (2025)
Figure 46. Global iSIM Module Revenue Market Share by Application in 2025
Figure 47. iSIM Module Sales by Company in 2025 (K Pcs)
Figure 48. Global iSIM Module Sales Market Share by Company in 2025
Figure 49. iSIM Module Revenue by Company in 2025 ($ millions)
Figure 50. Global iSIM Module Revenue Market Share by Company in 2025
Figure 51. Global iSIM Module Sales Market Share by Geographic Region (2021-2026)
Figure 52. Global iSIM Module Revenue Market Share by Geographic Region in 2025
Figure 53. Americas iSIM Module Sales 2021-2026 (K Pcs)
Figure 54. Americas iSIM Module Revenue 2021-2026 ($ millions)
Figure 55. APAC iSIM Module Sales 2021-2026 (K Pcs)
Figure 56. APAC iSIM Module Revenue 2021-2026 ($ millions)
Figure 57. Europe iSIM Module Sales 2021-2026 (K Pcs)
Figure 58. Europe iSIM Module Revenue 2021-2026 ($ millions)
Figure 59. Middle East & Africa iSIM Module Sales 2021-2026 (K Pcs)
Figure 60. Middle East & Africa iSIM Module Revenue 2021-2026 ($ millions)
Figure 61. Americas iSIM Module Sales Market Share by Country in 2025
Figure 62. Americas iSIM Module Revenue Market Share by Country (2021-2026)
Figure 63. Americas iSIM Module Sales Market Share by Cellular Release / Network Readiness (2021-2026)
Figure 64. Americas iSIM Module Sales Market Share by Application (2021-2026)

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Figure 65. United States iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 66. Canada iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 67. Mexico iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 68. Brazil iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 69. APAC iSIM Module Sales Market Share by Region in 2025
Figure 70. APAC iSIM Module Revenue Market Share by Region (2021-2026)
Figure 71. APAC iSIM Module Sales Market Share by Cellular Release / Network Readiness (2021-2026)
Figure 72. APAC iSIM Module Sales Market Share by Application (2021-2026)
Figure 73. China iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 74. Japan iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 75. South Korea iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 76. Southeast Asia iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 77. India iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 78. Australia iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 79. China Taiwan iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 80. Europe iSIM Module Sales Market Share by Country in 2025
Figure 81. Europe iSIM Module Revenue Market Share by Country (2021-2026)
Figure 82. Europe iSIM Module Sales Market Share by Cellular Release / Network Readiness (2021-2026)
Figure 83. Europe iSIM Module Sales Market Share by Application (2021-2026)
Figure 84. Germany iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 85. France iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 86. UK iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 87. Italy iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 88. Russia iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 89. Middle East & Africa iSIM Module Sales Market Share by Country (2021-2026)
Figure 90. Middle East & Africa iSIM Module Sales Market Share by Cellular Release / Network Readiness (2021-2026)
Figure 91. Middle East & Africa iSIM Module Sales Market Share by Application (2021-2026)
Figure 92. Egypt iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 93. South Africa iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 94. Israel iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 95. Turkey iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 96. GCC Countries iSIM Module Revenue Growth 2021-2026 ($ millions)
Figure 97. Manufacturing Cost Structure Analysis of iSIM Module in 2026
Figure 98. Manufacturing Process Analysis of iSIM Module

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Figure 99. Industry Chain Structure of iSIM Module
Figure 100. Channels of Distribution
Figure 101. Global iSIM Module Sales Market Forecast by Region (2027-2032)
Figure 102. Global iSIM Module Revenue Market Share Forecast by Region (2027-2032)
Figure 103. Global iSIM Module Sales Market Share Forecast by Cellular Release / Network Readiness (2027-2032)
Figure 104. Global iSIM Module Revenue Market Share Forecast by Cellular Release / Network Readiness (2027-2032)
Figure 105. Global iSIM Module Sales Market Share Forecast by Application (2027-2032)
Figure 106. Global iSIM Module Revenue Market Share Forecast by Application (2027-2032)

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