

eSIM Market by Application (Connected Cars, Laptops, M2M, Smartphones, Tablets, Wearables), Vertical (Automotive, Consumer Electronics, Energy & Utilities, Manufacturing, Retail, Transportation & Logistics), and Geography - Global Forecast to 2023

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Abstracts

“ESIM market to exhibit exponential growth between 2018 and 2023”

The global eSIM market is estimated to grow from USD 253.8 million in 2018 to USD 978.3 million by 2023, at a CAGR of 31.0% between 2018 and 2023. The growth of the eSIM market is attributed to the emphasis on remote SIM provisioning for M2M, favorable government regulations boosting M2M communication, and high adoption of IoT technology

“ESIM market for the smartphone application to grow at the highest CAGR between 2018 and 2023”

The rising persistent connectivity on smartphones and growing demand for high-bandwidth applications are driving the adoption of eSIM in smartphones and is anticipated to register exponential growth in the near future. Smartphone vendors are endeavored to bring eSIM into their smartphone offerings to gain a competitive edge in the market. Smartphone manufacturers are entering into collaborations with semiconductor companies to adopt this novel technology. For example, NXP Semiconductors collaborated with Shanghai Unicom (China) and roam2free (China) in June 2017 to develop a secure eSIM solution that makes it easy for consumers to add mobile plans and cellular networks to their smartphones.

“Consumer electronics vertical expected to dominate the eSIM market between 2018

and 2023”

The consumer electronics vertical remains one of the major forces shaping disruption, innovation, and growth across various technology industries. ESIM is anticipated to be a game changer in consumer electronics applications. It aids in intelligent switching of operator profiles without any hassle to the end user, with no geographical border constraints. The adoption of eSIMs by consumer electronics stakeholders is likely to position them as leading players in connectivity and IoT markets in the forthcoming years.

“Asia Pacific to be the fastest-growing eSIM market in the coming years”

Asia Pacific is expected to be the fastest-growing region in the eSIM market during the forecast period. Smartphone adoption is rising steadily in APAC; 3 (Australia, Singapore, and South Korea) out of the top 5 countries worldwide are from this region in terms of growing smartphone adoption. In 2016, India overtook the US as the second-largest smartphone market worldwide, after China. Mobile internet penetration in APAC has doubled in the past 5 years. Moreover, mobile operators are investing heavily to offer services at a competitive price. These forces are expected to drive the eSIM market growth in APAC. In addition, the rise in investments across industries such as automotive, power generation, and semiconductor is expected to further boost the market growth in APAC.

Breakdown of the profiles of the primary participants in the report has been given below:

By Company Type: Tier 1 — 49%, Tier 2 — 47%, and Tier 3 — 4%

By Designation: C-Level Executives — 38%, Directors — 32%, and Managers — 30%

By Region: North America — 36%, Europe — 29%, APAC — 23%, and RoW — 12%

Key players operating in the eSIM market include Deutsche Telekom AG (Germany), Gemalto NV (Netherlands), Giesecke & Devrient GmbH (Germany), Infineon Technologies AG (Germany), NTT DOCOMO, INC. (Japan), NXP Semiconductors N.V. (Netherlands), Sierra Wireless, Inc. (Canada), Singapore Telecommunications Limited (Singapore), STMicroelectronics (Switzerland), and Telefonica, S.A. (Spain).

Research Coverage:

The eSIM market research report covers different segments—application, vertical, and geography. The report covers 4 major geographic regions—North America, Europe, Asia Pacific (APAC), and Rest of the World (RoW).

Key Benefits of Buying the Report:

Illustrative segmentation; analysis; and forecast of the market by application, vertical, and geography give an overall view of the eSIM market

Value chain analysis to provide in-depth insights into the eSIM market

Major drivers, restraints, opportunities, and challenges for the eSIM market

Detailed competitive landscape, along with the key players, in-depth analysis, and revenue of the key players

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 DEFINITION
- 1.3 STUDY SCOPE
 - 1.3.1 MARKETS COVERED
 - 1.3.2 GEOGRAPHIC SCOPE
 - 1.3.3 YEARS CONSIDERED FOR STUDY
- 1.4 CURRENCY
- 1.5 LIMITATIONS
- 1.6 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 List of major secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Primary interviews with experts
 - 2.1.2.2 Breakdown of primary interviews
 - 2.1.2.3 Primary sources
 - 2.1.2.4 Key industry insights
 - 2.1.3 SECONDARY AND PRIMARY RESEARCH
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 BOTTOM-UP APPROACH
 - 2.2.1.1 Approach for capturing market size by bottom-up analysis (demand side)
 - 2.2.2 TOP-DOWN APPROACH
 - 2.2.2.1 Approach for capturing market size by top-down analysis (supply side)
- 2.3 MARKET BREAKDOWN AND DATA TRIANGULATION
- 2.4 RESEARCH ASSUMPTIONS

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

- 4.1 ATTRACTIVE OPPORTUNITIES IN ESIM MARKET
- 4.2 ESIM MARKET, BY APPLICATION

4.3 ESIM MARKET, BY VERTICAL

4.4 ESIM MARKET IN ASIA PACIFIC, BY APPLICATION AND COUNTRY

4.5 ESIM MARKET SHARE, BY COUNTRY

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 EVOLUTION OF SIM CARDS

5.3 MARKET DYNAMICS

5.3.1 DRIVERS

5.3.1.1 Emphasis on remote SIM provisioning for M2M

5.3.1.2 Favorable government regulations boosting M2M communication

5.3.1.3 High adoption of IoT technology

5.3.2 RESTRAINTS

5.3.2.1 Intensifying security threats

5.3.3 OPPORTUNITIES

5.3.3.1 Growing demand for smart solutions

5.3.3.2 Rising adoption of wearable electronics

5.3.4 CHALLENGES

5.3.4.1 Lack of standardization

5.3.4.2 Highly complex ecosystem

5.4 VALUE CHAIN ANALYSIS

6 ESIM MARKET, BY APPLICATION

6.1 INTRODUCTION

6.2 CONNECTED CARS

6.3 LAPTOPS

6.4 M2M

6.5 SMARTPHONES

6.6 TABLETS

6.7 WEARABLES

6.8 OTHERS

7 ESIM MARKET, BY VERTICAL

7.1 INTRODUCTION

7.2 AUTOMOTIVE

7.3 ENERGY & UTILITIES

7.4 MANUFACTURING

7.5 RETAIL

7.6 CONSUMER ELECTRONICS

7.7 TRANSPORTATION & LOGISTICS

8 GEOGRAPHIC ANALYSIS

8.1 INTRODUCTION

8.2 NORTH AMERICA

8.2.1 US

8.2.2 CANADA

8.2.3 MEXICO

8.3 EUROPE

8.3.1 GERMANY

8.3.2 UK

8.3.3 FRANCE

8.3.4 REST OF EUROPE

8.4 APAC

8.4.1 CHINA

8.4.2 JAPAN

8.4.3 INDIA

8.4.4 REST OF APAC

8.5 ROW

8.5.1 MIDDLE EAST

8.5.2 SOUTH AMERICA

8.5.3 AFRICA

9 COMPETITIVE LANDSCAPE

9.1 OVERVIEW

9.2 RANKING ANALYSIS OF PLAYERS, 2016

9.3 COMPETITIVE SCENARIO

9.3.1 PRODUCT LAUNCHES/DEVELOPMENTS

9.3.2 PARTNERSHIPS/ AGREEMENTS/ STRATEGIC ALLIANCES/
COLLABORATIONS

9.3.3 EXPANSIONS

10 COMPANY PROFILES

(Business overview, Products offered, Recent developments, MNM view, SWOT analysis)*

10.1 KEY PLAYERS

- 10.1.1 GEMALTO
- 10.1.2 STMICROELECTRONICS
- 10.1.3 INFINEON TECHNOLOGIES
- 10.1.4 NXP SEMICONDUCTORS
- 10.1.5 GIESECKE & DEVRIENT
- 10.1.6 DEUTSCHE TELEKOM
- 10.1.7 TELEF?NICA
- 10.1.8 NTT DOCOMO
- 10.1.9 SINGTEL
- 10.1.10 SIERRA WIRELESS

*Business overview, Products offered, Recent developments, MNM view, SWOT analysis might not be captured in case of unlisted companies.

10.2 OTHER KEY PLAYERS

- 10.2.1 APPLE
- 10.2.2 AT&T
- 10.2.3 CLX COMMUNICATIONS
- 10.2.4 ETISALAT
- 10.2.5 IDEMIA
- 10.2.6 JASPER
- 10.2.7 ORANGE
- 10.2.8 SAMSUNG ELECTRONICS
- 10.2.9 TELENOR CONNEXION
- 10.2.10 TELIT
- 10.2.11 VODAFONE

11 APPENDIX

- 11.1 INSIGHTS OF INDUSTRY EXPERTS
- 11.2 DISCUSSION GUIDE
- 11.3 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL
- 11.4 INTRODUCING RT: REAL-TIME MARKET INTELLIGENCE
- 11.5 AVAILABLE CUSTOMIZATIONS
- 11.6 RELATED REPORTS

11.7 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

Table 1 ESIM MARKET IN TERMS OF VALUE AND VOLUME, 2015–2023

Table 2 ESIM MARKET, BY APPLICATION, 2015–2023 (USD MILLION)

Table 3 ESIM MARKET, BY APPLICATION, 2015–2023 (MILLION UNITS)

Table 4 ESIM MARKET FOR CONNECTED CARS, BY REGION, 2015–2023 (USD MILLION)

Table 5 ESIM MARKET FOR LAPTOPS, BY REGION, 2015–2023 (USD THOUSAND)

Table 6 ESIM MARKET FOR M2M, BY REGION, 2015–2023 (USD MILLION)

Table 7 ESIM MARKET FOR SMARTPHONES, BY REGION, 2015–2023 (USD MILLION)

Table 8 ESIM MARKET FOR TABLETS, BY REGION, 2015–2023 (USD MILLION)

Table 9 ESIM MARKET FOR WEARABLES, BY REGION, 2015–2023 (USD MILLION)

Table 10 ESIM MARKET FOR OTHERS, BY REGION, 2015–2023 (USD MILLION)

Table 11 ESIM MARKET, BY VERTICAL, 2015–2023 (USD MILLION)

Table 12 ESIM MARKET FOR AUTOMOTIVE, BY REGION, 2015–2023 (USD MILLION)

Table 13 ESIM MARKET FOR ENERGY & UTILITIES, BY REGION, 2015–2023 (USD MILLION)

Table 14 ESIM MARKET FOR MANUFACTURING, BY REGION, 2015–2023 (USD MILLION)

Table 15 ESIM MARKET FOR RETAIL, BY REGION, 2015–2023 (USD MILLION)

Table 16 ESIM MARKET FOR CONSUMER ELECTRONICS, BY REGION, 2015–2023 (USD MILLION)

Table 17 ESIM MARKET FOR TRANSPORTATION & LOGISTICS, BY REGION, 2015–2023 (USD MILLION)

Table 18 ESIM MARKET, BY REGION, 2015–2023 (USD MILLION)

Table 19 ESIM MARKET IN NORTH AMERICA, BY APPLICATION, 2015–2023 (USD MILLION)

Table 20 ESIM MARKET IN NORTH AMERICA, BY VERTICAL, 2015–2023 (USD MILLION)

Table 21 ESIM MARKET IN NORTH AMERICA, BY COUNTRY, 2015–2023 (USD MILLION)

Table 22 ESIM MARKET IN EUROPE, BY APPLICATION, 2015–2023 (USD MILLION)

Table 23 ESIM MARKET IN EUROPE, BY VERTICAL, 2015–2023 (USD MILLION)

Table 24 ESIM MARKET IN EUROPE, BY COUNTRY, 2015–2023 (USD MILLION)

Table 25 ESIM MARKET IN APAC, BY APPLICATION, 2015–2023 (USD MILLION)

Table 26 ESIM MARKET IN APAC, BY VERTICAL, 2015–2023 (USD MILLION)

Table 27 ESIM MARKET IN APAC, BY COUNTRY, 2015–2023 (USD MILLION)

Table 28 ESIM MARKET IN ROW, BY APPLICATION, 2015–2023 (USD MILLION)

Table 29 ESIM MARKET IN ROW, BY VERTICAL, 2015–2023 (USD MILLION)

Table 30 ESIM MARKET IN ROW, BY REGION, 2015–2023 (USD MILLION)

Table 31 RANKING ANALYSIS OF KEY PLAYERS IN ESIM MARKET, 2016

About

According to the new market research report "eSIM Market by Application (Connected Cars, Laptops, M2M, Smartphones, Tablets, Wearables), Vertical (Automotive, Consumer Electronics, Energy & Utilities, Manufacturing, Retail, Transportation & Logistics), and Geography - Global Forecast to 2023", the eSIM market is estimated to grow from USD 253.8 Million in 2018 to USD 978.3 Million by 2023, at a CAGR of 31.0% between 2018 and 2023. The growth is attributed to the emphasis on remote SIM provisioning for M2M, favorable government regulations boosting M2M communication, and high adoption of IoT technology.

Major players operating in the eSIM market include

Deutsche Telekom AG (Germany)

Gemalto NV (Netherlands)

Giesecke & Devrient GmbH (Germany)

Infineon Technologies AG (Germany)

NTT DOCOMO, INC. (Japan)

NXP Semiconductors N.V. (Netherlands)

Sierra Wireless, Inc. (Canada)

Singapore Consumer Electronics Limited (Singapore)

STMicroelectronics (Switzerland)

Telefónica, S.A. (Spain)

"eSIM market for the smartphone application to grow at the highest rate between 2018 and 2023"

The growing demand for high-bandwidth applications and rising persistent connectivity on smartphones are likely to spur the growth of the eSIM market for the smartphone application during the forecast period. Smartphone vendors are endeavored to bring eSIM into their smartphone offerings to gain a competitive edge in the market. For example, Google LLC (US) launched Pixel 2 and XL models with eSIM in October 2017. After Google, major giants such as Apple Inc. (US) and Samsung (South Korea) are expected to integrate eSIM into their flagship smartphones, and this trend is likely to be followed by key smartphone manufacturers such as Huawei Technologies Co., Ltd. (China), OPPO Electronics Corp. (China), and Xiaomi Inc. (China).

"Consumer Electronics vertical leads the eSIM market between 2018 and 2023"

eSIM offers ease of roaming or switching. In addition, it is expected that the adoption of eSIMs will reduce carrier replacement barriers. This is likely to increase the competition among telecom operators, thereby benefitting consumers. The rising adoption of high-speed data transfer technologies such as 4G and 5G, increasing social engagement activities across the world, and ongoing technological advancements are primarily driving the adoption of eSIMs in the consumer electronics vertical.

"North America is anticipated to lead the eSIM market by 2023"

North America is a forerunner in the adoption of technological advancements across a myriad of verticals, such as automotive; energy and utilities; manufacturing; retail; Consumer Electronics; and transportation and logistics. These advancements are primarily aimed to deliver compact and low-power consumption products. Owing to this, North America is anticipated to lead the eSIM market during the forecast period. In addition, North America is a key region in the development and evolution of M2M technology. This region is home to some of the major multinational companies catering to the M2M market. Owing to this, North America is likely to dominate the eSIM market by 2023.

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