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SIP Trunking Services Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Organization Size (Small Businesses, Mid-Sized Businesses, Large Enterprises), By End-User (Banking, Financial Services, and Insurance (BFSI), Education, Retail, Healthcare, Transportation & Logistics, Travel & Hospitality, Manufacturing, Other), By Region & Competition, 2021-2031F

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Abstracts

The Global SIP Trunking Services Market is projected to expand from USD 14.27 Billion in 2025 to USD 28.23 Billion by 2031, registering a compound annual growth rate of 12.04%. Essentially, Session Initiation Protocol (SIP) trunking is a communication service that links a company?s on-premise private branch exchange (PBX) to the public switched telephone network (PSTN) via the internet, effectively replacing traditional fixed telephone lines. The market's growth is primarily driven by the substantial cost savings realized through the elimination of hardware maintenance, the ability to scale channel capacity on demand, and the global necessity to migrate from outdated analog infrastructure. This structural shift is highlighted by the rapid decline of legacy systems; for example, Ofcom reported in 2024 that legacy voice connections dropped to just 27% of all landline connections, down from 41% the previous year, as enterprises accelerate their transition to digital voice solutions.

However, market expansion faces a significant obstacle regarding the reliance on consistent, high-speed internet connectivity. Since SIP trunking transmits voice data over IP networks, organizations located in regions with unstable infrastructure frequently encounter quality of service issues, such as latency and packet loss. These technical

difficulties can compromise communication clarity and discourage the adoption of SIP solutions in environments where mission-critical reliability is essential.

Market Driver

The worldwide transition from legacy PSTN and ISDN systems to IP-based networks serves as the fundamental catalyst for the adoption of SIP trunking services. As telecommunications operators and regulatory bodies decommission obsolete copper infrastructure, enterprises are forced to migrate to digital voice solutions to maintain service continuity. This structural displacement is evident in data from the Commission for Communications Regulation (ComReg), which noted in its 'Quarterly Key Data Report Q1 2024' that fixed voice traffic in Ireland fell by 25% in the first quarter of 2024 compared to the same period in 2023, reflecting the rapid obsolescence of traditional telephony. Consequently, this mandatory migration creates an urgent, non-negotiable demand for SIP trunks as the essential connectivity layer for modern IP-based Private Branch Exchange (PBX) systems.

Simultaneously, the swift proliferation of cloud-based Unified Communications (UC) services is transforming market consumption patterns, moving voice services from on-premise hardware to flexible cloud platforms. Major UCaaS providers are now integrating public switched telephone network (PSTN) connectivity directly, necessitating robust SIP trunking backbones to handle high volumes of concurrent calls. For instance, Microsoft reported in its 'Fiscal Year 2024 Third Quarter Earnings Conference Call' in April 2024 that Teams Phone PSTN users reached 20 million, a 30% increase year-over-year. This surge in cloud adoption generates significant commercial opportunities for SIP providers; Gamma Communications PLC, in its 'Annual Report and Accounts 2023' released in March 2024, reported an 8% revenue increase to ?521.7 million, driven largely by growth in their business and enterprise cloud voice segments.

Market Challenge

The dependency on consistent, high-speed internet connectivity presents a formidable barrier to the expansion of the Global SIP Trunking Services Market. Unlike traditional telephony, SIP trunking encapsulates voice signals into digital packets for transmission over IP networks, making the service inherently vulnerable to bandwidth fluctuations. In regions with underdeveloped digital infrastructure, organizations frequently encounter significant quality of service issues, including high latency, jitter, and packet loss. These technical deficiencies degrade call clarity and reliability, compelling enterprises to retain

expensive legacy analog systems rather than risking their operational communications on unstable IP connections.

This reliance on robust network architecture restricts the addressable market size, particularly in developing economies where the digital divide remains pronounced. Service providers cannot effectively deploy SIP solutions in areas where the fundamental transport layer is absent or unreliable. According to the International Telecommunication Union, approximately 2.6 billion people remained offline worldwide in 2024, accounting for 32 percent of the global population. This substantial lack of connectivity underscores the physical limitations hindering the universal adoption of SIP services, effectively preventing the market from reaching its full global potential.

Market Trends

The increasing popularity of Bring Your Own Carrier (BYOC) models is fundamentally altering procurement strategies as enterprises progressively unbundle telephony services from Unified Communications as a Service (UCaaS) platforms. This approach allows organizations to select independent SIP trunking providers while maintaining their preferred collaboration interfaces, granting them greater control over call routing, regulatory compliance, and global coverage. By decoupling the carrier layer, businesses can negotiate superior rates and ensure redundancy, avoiding the vendor lock-in associated with bundled carrier plans. The commercial momentum of this unbundled infrastructure is evident; Bandwidth Inc. reported total revenue of $174 million in its 'Second Quarter 2024 Financial Results' in August 2024, a figure driven significantly by the demand for enterprise-grade cloud communications and direct carrier integration.

At the same time, the deployment of AI-driven automated fraud detection systems has become a critical technological imperative to secure SIP architecture against sophisticated threats like International Revenue Share Fraud (IRSF) and Wangiri attacks. Traditional static rule sets are no longer sufficient to stop dynamic attack vectors, prompting providers to integrate machine learning algorithms that analyze traffic patterns in real-time to block anomalies before financial damage occurs. The necessity for these advanced defensive mechanisms is underscored by the escalating volume of malicious traffic; Hiya's '2024 State of the Call Report' from April 2024 noted that 28% of all unknown calls processed in 2023 were identified as fraud or spam, highlighting the severe security risks that AI-enhanced SIP solutions must now mitigate.

Key Market Players

AT&T, Inc.

8&8, Inc.

Bandwidth Inc.

BT Group Plc

Lumen Technologies

GTT Communications

Verizon Communications Inc.

Colt Technology Services Group Limited

Deutsche Telekom AG

Gamma Communications Plc

Report Scope

In this report, the Global SIP Trunking Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

SIP Trunking Services Market, By Organization Size

Small Businesses

Mid-Sized Businesses

Large Enterprises

SIP Trunking Services Market, By End-User

Banking, Financial, Services, Insurance (BFSI)

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- Education
- Retail
- Healthcare
- Transportation & Logistics
- Travel & Hospitality
- Manufacturing
- Other

SIP Trunking Services Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- Asia Pacific
  - China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global SIP Trunking Services Market.

Available Customizations:

Global SIP Trunking Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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Detailed analysis and profiling of additional market players (up to five).

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