

Asia Pacific eSIM Market Size and Forecast (2021 - 2031) Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Hardware and Software & Services) and Type (Consumer eSIMs, IoT eSIMs, and Travel eSIMs)

<https://marketpublishers.com/r/A16BCE06C011EN.html>

Date: October 2025

Pages: 156

Price: US\$ 3,450.00 (Single User License)

ID: A16BCE06C011EN

Abstracts

The Asia Pacific eSIM market is poised for significant growth, projected to reach approximately US\$ 4,800.47 million by 2031, up from US\$ 1,325.22 million in 2024. This growth trajectory indicates a robust compound annual growth rate (CAGR) of 20.5% from 2025 to 2031, driven by the region's expansive geography, diverse nations, and escalating demand for digital connectivity.

The increasing adoption of eSIM technology is transforming how travelers and businesses manage their connectivity needs. One of the standout benefits of eSIMs in the Asia Pacific region is the elimination of roaming charges, which can quickly accumulate during multi-country travels. With prepaid eSIM data plans, users can effectively manage their expenses and avoid unexpected charges. The activation process is user-friendly, allowing eSIMs to automatically connect to local networks upon arrival, ensuring immediate access to data without the hassle of purchasing physical SIM cards. This feature, often described as "connect in a few taps," simplifies the travel experience across countries like Hong Kong, South Korea, Japan, and Australia, providing seamless connectivity through various networks. Users can choose flexible data plans tailored to their specific needs, whether for short trips or extended stays.

Beyond cost savings, eSIM technology enhances the travel experience by facilitating smooth transitions between different network providers, which is particularly beneficial in Asia's diverse landscape. This capability allows users to enjoy uninterrupted services such as streaming, video calls, and navigation without the inconvenience of changing

SIM cards.

Market Segmentation Analysis

The Asia Pacific eSIM market can be segmented based on components and types. In terms of components, the market is divided into hardware and software & services, with the hardware segment holding a larger market share in 2024. When categorized by type, the market includes consumer eSIMs, IoT eSIMs, and travel eSIMs, with consumer eSIMs dominating the market in 2024. The consumer eSIM segment is further divided into sub-segments such as smartphones, connected cars, wearables, laptops, tablets, and others.

eSIM Technology in the Automotive Sector

The automotive industry is increasingly adopting eSIM technology, which offers numerous advantages over traditional SIM cards. eSIMs are embedded directly into vehicles, allowing for remote provisioning and centralized connectivity management. This capability ensures continuous vehicle connectivity, enabling features such as real-time traffic updates, navigation assistance, remote diagnostics, over-the-air (OTA) software updates, and access to emergency services. For global automotive original equipment manufacturers (OEMs), automotive-grade eSIMs streamline manufacturing and supply chain processes. A standardized eSIM design can be integrated across various vehicle models, with network profiles provisioned remotely after production, eliminating the need for region-specific SIM variants and reducing logistical complexities.

From a safety and security perspective, eSIMs provide robust benefits. They are embedded during manufacturing, serving as secure identifiers and encrypting communications during vehicle operation, which ensures data integrity and privacy. The integration of eSIMs as a "root of trust" enhances the reliability of connectivity-based services. Key players in the industry are driving innovation in eSIM technology. For instance, in February 2025, Thales, a leader in advanced digital security, partnered with Cubic, a significant player in software-defined vehicle (SDV) platforms, to enhance Cubic's eSIM capabilities by utilizing Thales's eSIM management platform, which aligns with the latest GSMA standards. This collaboration aims to facilitate seamless and scalable connectivity across various sectors, including automotive, transportation, and agriculture.

Country Insights

The Asia Pacific eSIM market encompasses several key countries, including China, Japan, India, South Korea, Australia, and others. In 2024, China held the largest market share. The eSIM market in China has experienced notable advancements, particularly in consumer electronics and IoT, as well as in smartphone eSIM integration. Significant progress has been made in remote SIM provisioning and eSIM integration in smartwatches, driven by collaborations among mobile operators, OEMs, SIM vendors, IoT companies, and technology providers. Major smartwatch manufacturers like Apple, Huawei, Mobvoi, and Samsung are actively innovating in this area, with Chinese mobile operators offering limited eSIM functionality through services that allow smartwatches to share mobile subscriptions with smartphones.

Strong industry collaboration is crucial for laying the groundwork for future deployment. Key stakeholders include the Ministry of Industry and Information Technology (MIIT), GSMA, China Academy of Information and Communications Technology (CAICT), Telecommunication Terminal Industry Forum Association (TAF), and China Communications Standards Association (CCSA). The IoT sector is a significant growth driver, with GSMA Intelligence projecting nearly 2 billion licensed cellular IoT connections in China by 2025, up from 700 million in 2018, highlighting the country's pivotal role in the global evolution of eSIM technology.

Key Players in the Market

Prominent players in the Asia Pacific eSIM market include KORE Wireless, Giesecke Devrient GmbH, IDEMIA France SAS, Infineon Technologies AG, NXP Semiconductors NV, STMicroelectronics NV, Telefonica SA, Thales SA, Vodafone Group Plc, and Deutsche Telekom AG, among others. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase market share.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macro-economic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country level data:
- 3.3 Assumptions and Limitations

4. ASIA PACIFIC ESIM MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 Mobile Network Operators (MNOs) and Mobile Virtual Network Operators (MVNOs):
 - 4.3.2 Device Manufacturers (OEMs):
 - 4.3.3 eSIM Platform Providers
 - 4.3.4 Regulatory and Standards Bodies:
 - 4.3.5 End-Users:
 - 4.3.6 List of Vendors in the Value Chain:

5. ASIA PACIFIC ESIM MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers

- 5.1.1 Rising Adoption in Smartphones
- 5.1.2 Increasing Integration of eSIM in the Automotive Industry
- 5.1.3 Growing Inclination for Cost-Saving Options
- 5.2 Market Restraints
 - 5.2.1 Regulatory Challenges
- 5.3 Market Opportunities
 - 5.3.1 Surge in Travellers eSIM
 - 5.3.2 Expansion in IoT Devices
- 5.4 Future Trends
 - 5.4.1 AI in eSIM Connectivity Management
- 5.5 Impact of Drivers and Restraints:

6. ESIM MARKET - ASIA PACIFIC ANALYSIS

- 6.1 Asia Pacific eSIM Market Revenue (US\$ Million), 2021-2031
- 6.2 Asia Pacific eSIM Market Forecast Analysis

7. ASIA PACIFIC ESIM MARKET ANALYSIS - BY COMPONENT

- 7.1 Hardware
 - 7.1.1 Overview
 - 7.1.2 Hardware: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 7.2 Software and Services
 - 7.2.1 Overview
 - 7.2.2 Software and Services: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8. ASIA PACIFIC ESIM MARKET ANALYSIS - BY TYPE

- 8.1 Consumer eSIMs
 - 8.1.1 Overview
 - 8.1.2 Consumer eSIMs: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 8.2 IoT eSIMs
 - 8.2.1 Overview
 - 8.2.2 IoT eSIMs: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 8.3 Travel eSIMs

8.3.1 Overview

8.3.2 Travel eSIMs: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031
(US\$ Million)

9. ASIA PACIFIC ESIM MARKET ANALYSIS - BY CONSUMER ESIMS APPLICATION

9.1 Smartphones

9.1.1 Overview

9.1.2 Smartphones: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031
(US\$ Million)

9.2 Connected Cars

9.2.1 Overview

9.2.2 Connected Cars: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031
(US\$ Million)

9.3 Wearables

9.3.1 Overview

9.3.2 Wearables: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.4 Laptops and Tablets

9.4.1 Overview

9.4.2 Laptops and Tablets: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.5 Others

9.5.1 Overview

9.5.2 Others: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10. ASIA PACIFIC ESIM MARKET - COUNTRY ANALYSIS

10.1 Asia Pacific

10.1.1 Asia Pacific eSIM Market - Revenue and Forecast Analysis - by Country

10.1.1.1 Asia Pacific eSIM Market - Revenue and Forecast Analysis - by Country

10.1.1.2 China: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.2.1 China: Asia Pacific eSIM Market Share - by Component

10.1.1.2.2 China: Asia Pacific eSIM Market Share - by Type

10.1.1.2.3 China: Asia Pacific eSIM Market Share - by Consumer eSIM Application

10.1.1.3 Japan: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Million)

10.1.1.3.1 Japan: Asia Pacific eSIM Market Share - by Component

10.1.1.3.2 Japan: Asia Pacific eSIM Market Share - by Type

10.1.1.3.3 Japan: Asia Pacific eSIM Market Share - by Consumer eSIM Application

10.1.1.4 India: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.4.1 India: Asia Pacific eSIM Market Share - by Component

10.1.1.4.2 India: Asia Pacific eSIM Market Share - by Type

10.1.1.4.3 India: Asia Pacific eSIM Market Share - by Consumer eSIM Application

10.1.1.5 South Korea: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.5.1 South Korea: Asia Pacific eSIM Market Share - by Component

10.1.1.5.2 South Korea: Asia Pacific eSIM Market Share - by Type

10.1.1.5.3 South Korea: Asia Pacific eSIM Market Share - by Consumer eSIM

Application

10.1.1.6 Australia: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.6.1 Australia: Asia Pacific eSIM Market Share - by Component

10.1.1.6.2 Australia: Asia Pacific eSIM Market Share - by Type

10.1.1.6.3 Australia: Asia Pacific eSIM Market Share - by Consumer eSIM

Application

10.1.1.7 Rest of APAC: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.7.1 Rest of APAC: Asia Pacific eSIM Market Share - by Component

10.1.1.7.2 Rest of APAC: Asia Pacific eSIM Market Share - by Type

10.1.1.7.3 Rest of APAC: Asia Pacific eSIM Market Share - by Consumer eSIM

Application

11. COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning & Concentration

12. INDUSTRY LANDSCAPE

12.1 Overview

12.2 New Product Development

12.3 Partnerships and Collaboration

13. COMPANY PROFILES

13.1 KORE Wireless

- 13.1.1 Key Facts
- 13.1.2 Business Description
- 13.1.3 Products and Services
- 13.1.4 Financial Overview
- 13.1.5 SWOT Analysis
- 13.1.6 Key Developments

13.2 Giesecke Devrient GmbH

- 13.2.1 Key Facts
- 13.2.2 Business Description
- 13.2.3 Products and Services
- 13.2.4 Financial Overview
- 13.2.5 SWOT Analysis
- 13.2.6 Key Developments

13.3 IDEMIA France SAS

- 13.3.1 Key Facts
- 13.3.2 Business Description
- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments

13.4 Infineon Technologies AG

- 13.4.1 Key Facts
- 13.4.2 Business Description
- 13.4.3 Products and Services
- 13.4.4 Financial Overview
- 13.4.5 SWOT Analysis
- 13.4.6 Key Developments

13.5 NXP Semiconductors NV

- 13.5.1 Key Facts
- 13.5.2 Business Description
- 13.5.3 Products and Services
- 13.5.4 Financial Overview
- 13.5.5 SWOT Analysis
- 13.5.6 Key Developments

13.6 STMicroelectronics NV

- 13.6.1 Key Facts

- 13.6.2 Business Description
- 13.6.3 Products and Services
- 13.6.4 Financial Overview
- 13.6.5 SWOT Analysis
- 13.6.6 Key Developments
- 13.7 Telefonica SA
 - 13.7.1 Key Facts
 - 13.7.2 Business Description
 - 13.7.3 Products and Services
 - 13.7.4 Financial Overview
 - 13.7.5 SWOT Analysis
 - 13.7.6 Key Developments
- 13.8 Thales SA
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments
- 13.9 Vodafone Group Plc
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 Deutsche Telekom AG
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments

14. APPENDIX

- 14.1 Word Index
- 14.2 About the Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Asia Pacific eSIM Market Segmentation

Table 2. Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 3. Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Component

Table 4. Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Type

Table 5. Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Consumer eSIM Application

Table 6. Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 7. China: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 8. China: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Type

Table 9. China: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Consumer eSIM Application

Table 10. Japan: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 11. Japan: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Type

Table 12. Japan: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Consumer eSIM Application

Table 13. India: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 14. India: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Type

Table 15. India: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Consumer eSIM Application

Table 16. South Korea: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 17. South Korea: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Type

Table 18. South Korea: Asia Pacific eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Consumer eSIM Application

Table 19. Australia: Asia Pacific eSIM Market - Revenue and Forecast, 2021 -

2031(US\$ Million) - by Component

Table 20. Australia: Asia Pacific eSIM Market - Revenue and Forecast, 2021 -

2031(US\$ Million) - by Type

Table 21. Australia: Asia Pacific eSIM Market - Revenue and Forecast, 2021 -

2031(US\$ Million) - by Consumer eSIM Application

Table 22. Rest of APAC: Asia Pacific eSIM Market - Revenue and Forecast, 2021 -

2031(US\$ Million) - by Component

Table 23. Rest of APAC: Asia Pacific eSIM Market - Revenue and Forecast, 2021 -

2031(US\$ Million) - by Type

Table 24. Rest of APAC: Asia Pacific eSIM Market - Revenue and Forecast, 2021 -

2031(US\$ Million) - by Consumer eSIM Application

Table 25. Company Positioning & Concentration

Table 26. List of Abbreviation

List Of Figures

LIST OF FIGURES

Figure 1. Asia Pacific eSIM Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: eSIM Market

Figure 4. Asia Pacific eSIM Market - Key Market Dynamics

Figure 5. Number of eSIMs Compatible Smartphones

Figure 6. Number of eSIM Smartphones Models Launched From 2018 to 2023

Figure 7. Impact Analysis of Drivers and Restraints

Figure 8. Asia Pacific eSIM Market Revenue (US\$ Million), 2021-2031

Figure 9. Asia Pacific eSIM Market Share (%) - by Component (2024 and 2031)

Figure 10. Hardware: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 11. Software and Services: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. Asia Pacific eSIM Market Share (%) - by Type (2024 and 2031)

Figure 13. Consumer eSIMs: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 14. IoT eSIMs: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 15. Travel eSIMs: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 16. Asia Pacific eSIM Market Share (%) - by Consumer eSIM Application (2024 and 2031)

Figure 17. Smartphones: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Connected Cars: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 19. Wearables: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 20. Laptops and Tablets: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 21. Others: Asia Pacific eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 22. Asia Pacific eSIM Market Breakdown, by Key Countries, 2024 and 2031 (%)

Figure 23. China: Asia Pacific eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 24. Japan: Asia Pacific eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 25. India: Asia Pacific eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 26. South Korea: Asia Pacific eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 27. Australia: Asia Pacific eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 28. Rest of APAC: Asia Pacific eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 29. Heat Map Analysis by Key Players

I would like to order

Product name: Asia Pacific eSIM Market Size and Forecast (2021 - 2031) Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Hardware and Software & Services) and Type (Consumer eSIMs, IoT eSIMs, and Travel eSIMs)

Product link: <https://marketpublishers.com/r/A16BCE06C011EN.html>

Price: US\$ 3,450.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/A16BCE06C011EN.html>