

Trusted Connectivity Alliance: SIM and eSIM Industry Insights

Consumer eSIM Adoption Doubled in 2023

eSIM profile downloads - also known as eSIM profile transactions - refer to the number of times a mobile operator profile was downloaded to a device.

▶ Consumer eSIM profile downloads increased

109% year-on-year ↑

▶ Key driver of adoption was the availability and demand for eSIM-only smartphones within the North American market.

▶ Future growth in consumer eSIM adoption is expected to be boosted by:

Launch of eSIM-only smartphones across more regions.

Wider availability of eSIM-enabled devices.

Increasing international travel.

▶ Increased consumer uptake was supported by significant ongoing investment in the enabling infrastructure.

eSIM Subscription Manager (SM) platforms enable the remote provisioning and lifecycle management of eSIMs.

→ Number of deployed consumer eSIM SM platforms rose by 25%.

25% increase in 2023 ↑

→ Mobile operators are increasingly supporting 'digital-first' strategies.

“TCA’s latest data makes it clear that wider eSIM availability is translating into strong adoption, with consumers across the world now realising the benefits of flexible and seamless connectivity.”

Bertrand Moussel, Chair of the TCA Board

Strong Foundation for eSIM Adoption Across Automotive and IoT Verticals

▶ M2M eSIM adoption was supported by a 12% increase in the deployment of M2M eSIM SM platforms.

12% increase ↑

Automotive use-cases remain key.

▶ Global standardisation efforts will play an important role in promoting increased eSIM adoption across IoT verticals.

→ GSMA’s dedicated eSIM for IoT Specifications (SGP.31 and SGP.32) will simplify IoT deployments at massive scale.

eSIM Volumes Resilient Despite Significant Economic Uncertainty

▶ eSIM volumes remained stable in the face of strong macro-economic headwinds:

- Global inflation
- ‘Cost-of-living’ crisis
- Ongoing impact of chip shortage

▶ eSIM shipments reported by TCA members decreased marginally by 2% to

374 million units ↓

▶ Improved economic picture towards the end of the year points towards a more positive outlook for 2024.

Digitalisation of the SIM Market Accelerates

▶ TCA estimates that the total available market for SIM (excluding eSIM) was

3.8 billion units in 2023.

▶ Strong eSIM adoption in key regions such as North America is driving the increased digitalisation of the overall SIM market.

A breakdown of data collected through TCA’s member monitoring process is available via an annual subscription. For more information, please contact info@trustedconnectivityalliance.org

About Trusted Connectivity Alliance

Trusted Connectivity Alliance (TCA) is a global industry association working to enable trust in a connected future.

The organisation evolved from the SIMalliance, reflecting the continued expansion of the global SIM industry and the need for broader collaboration. Its members are leading providers of secure connectivity solutions for consumer, IoT and M2M devices. This spans Tamper Resistant Element (TRE) technologies including SIM, eSIM, integrated SIM, embedded Secure Element (eSE) and integrated Secure Element (iSE), as well as hardware and software provisioning and other personalisation services.

TCA members are:

