

Enabling trust in a connected future

Trusted Connectivity Alliance: eSIM Industry Insights 2024



quantitative global view of eSIM shipments, providing both actual and forecast data. This offers unparalleled and authoritative intelligence into the ongoing development of the eSIM ecosystem.



1) 56% yearon-year

devices was matched by rising consumer adoption.

Consumer eSIM profile downloads increased

refer to the number of times a mobile operator profile was downloaded to a device.

also known as eSIM

profile transactions -

Improved Economic Conditions and Continued Innovation Drive eSIM Growth

The eSIM market was positively impacted by:

- Improving economic conditions that saw demand for smartphones and mobile subscriptions recover.
- The launch of new eSIM-only devices, eSIM-enabled mid-range models and 5G smartphones.

North America once again led in consumer eSIM adoption due to the prominence of eSIM-only devices and because operators continued to pursue 'digital-first' strategies.

Profile downloads more than doubled in Asia, while Europe also saw strong uptake.



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

 Number of deployed consumer eSIM SM platforms rose by

18%

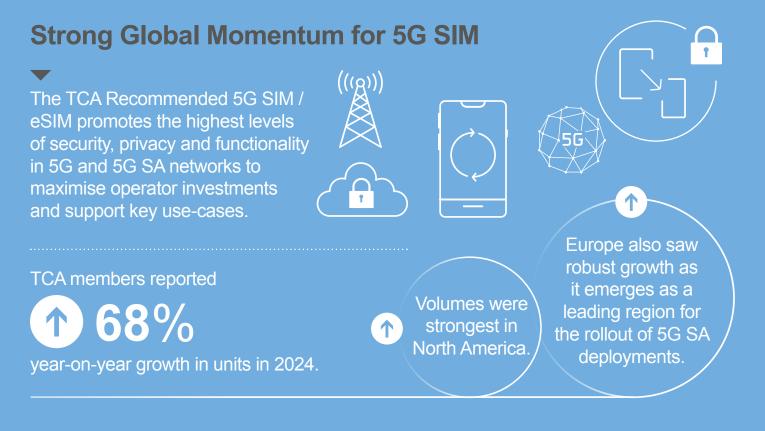
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TCA members also reported significant M2M eSIM adoption.

Looking ahead, the release of GSMA's eSIM IoT Specification (SGP.32) stands to accelerate the use of eSIM technology across IoT use-cases. eSIM Subscription Manager (SM) platforms enable the remote provisioning and lifecycle management of eSIMs.

Our latest data offers the clearest demonstration yet of the extent to which eSIM technology is now being harnessed across the global digital economy. ??

TCA's market data also provides exclusive statistical insight into the broader SIM ecosystem, with other key industry trends in 2024 including:



'Traditional' SIM Market Remains Significant Amid Ongoing Evolution

TCA estimates that the total available market for SIM* was **3.7 billion units** in 2024

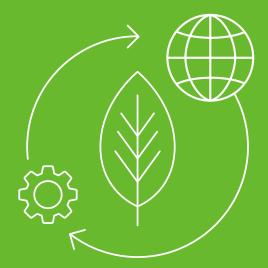
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The market continues to be shaped by accelerating digitalisation as eSIM adoption increases in key geographies such as North America.

→ Local players are strengthening market share across lower-cost categories in India, China, and across the Pacific and MEA regions.

* Includes removable SIM and soldered SIM for M2M form factors. Excludes eSIM.

Enhanced Sustainability Across the Mobile Ecosystem



37% of all SIM volumes collectively reported by TCA members were in the half SIM format.

A third of SIM volumes in Europe were manufactured using eco-friendly raw materials.

This reflects the trend of significantly reducing plastic waste and associated emissions.

A breakdown of data collected through TCA's member monitoring process is available via an annual subscription. For more information, please contact **Particular 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's vision is to drive the sustained growth of a connected society through trusted connectivity which protects assets, end user privacy and networks. TCA members are leaders within the global Tamper Resistant Element (TRE) ecosystem and work collectively to define requirements and provide deliverables of a strategic, technical and marketing nature. This enables all stakeholders in our connected society to benefit from the most stringent secure connectivity solutions that leverage TCA members' expertise in tamper proof end-to-end-security.