

Mid-Year Market Snapshot H1 2026



Trusted Connectivity Alliance (TCA) represents **~85%** of the eSIM hardware market.



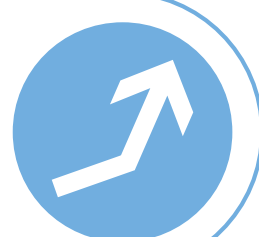
The TCA market monitoring process provides a trusted and exclusive source of global SIM and eSIM shipment, platform and transaction data.



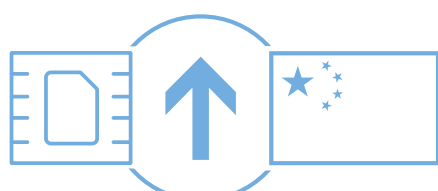
Consumer eSIM Adoption Surges as China Emerges as a Leading eSIM Market

► In the first six months of 2026, consumer demand for eSIM technology accelerated sharply.

In H1 2026, consumer eSIM profile downloads worldwide equalled almost the same volume realised across the full year in 2025.



► Global adoption was driven by a significant uplift in China:

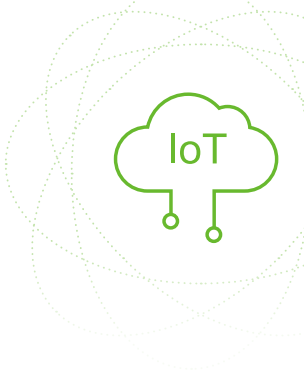


- Leading domestic operators received regulatory approval to offer eSIM services in October 2025.
- Major eSIM-enabled devices launched in the region.
- Availability of eSIM travel plans for inbound and outbound travellers.

► Adoption also continued to increase throughout North America and Europe, alongside emerging markets such as the Middle East and Africa (MEA) and South America.



SGP.32 Momentum Continues



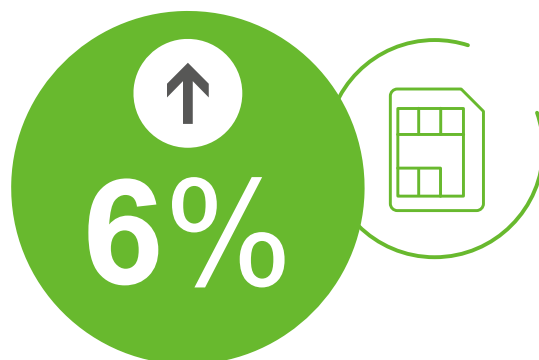
In H1 2026, the market continued to embrace GSMA's eSIM IoT Specification (SGP.32) to simplify the remote provisioning and management of IoT devices.

Compared to full year 2025, there was a **fivefold increase globally** in the number of eSIM Subscription Manager (SM) platforms that enable profile downloads in accordance with the specification.

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Traditional SIM Market Remains Resilient

► TCA member SIM shipments increased by **6% year-on-year** in H1 2026 amid ongoing digitalisation and increasing demand for eSIM technology.



A full breakdown of data collected through TCA's 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.