

# Key eSIM Statistics

May 2025

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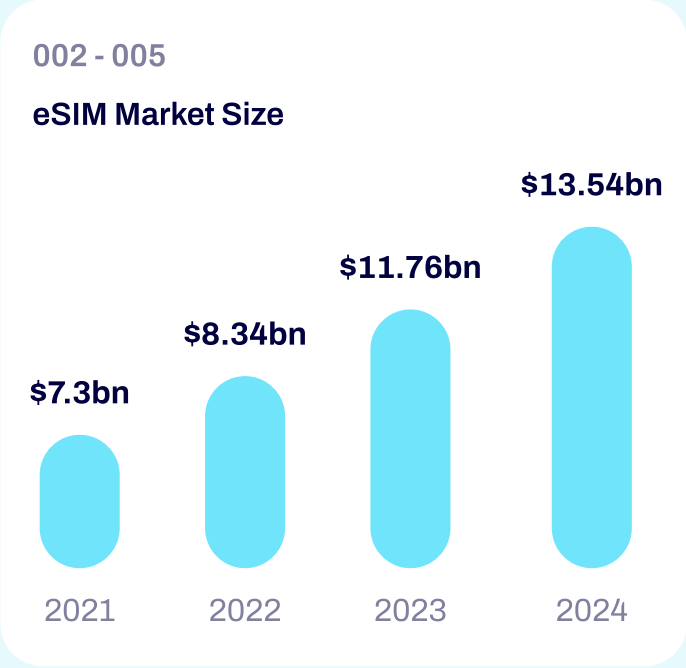


01

# Consumer eSIM Market: Size & Worth

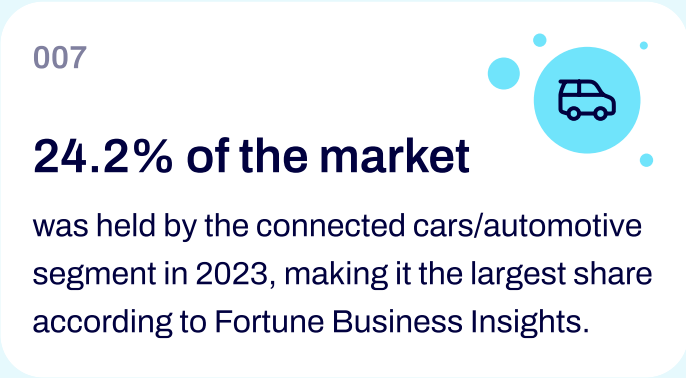
001

The consumer-focused eSIM market was valued at approximately USD 1.22 billion in 2023 and is expected to reach USD 6.29 billion by 2030, growing at a CAGR of 20% from 2024 to 2032. Fortune Business Insights



006

eSIM Market Size in 2030: According to previous estimates, the market was projected to reach USD 17.5 billion by 2030. However, according to the most recent report, the market is projected to reach USD 31.82 billion by 2030, increasing the projections by nearly 82% between 2024 and 2025. Mobilise



008

**1 million**

eSIM card shipments are expected annually in the automotive industry by 2028, marking a nearly sevenfold increase over 2023, according to ABI Research.

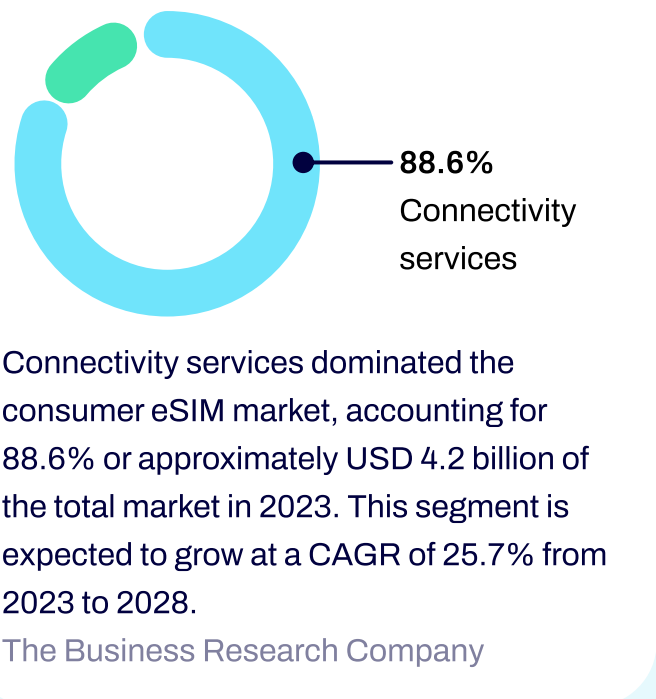
009

Consumer electronics, especially wearables like smartwatches and smart glasses, are projected to grow at a CAGR of 27.9% from 2023 to 2028. The Business Research Company

010

The smartphone and tablet segment is expected to be the fastest growing segment in the eSIM market segmented by application, at a CAGR of 8% during the 2023-2028 period. The Business Research Company

011





012

**1.2 billion**

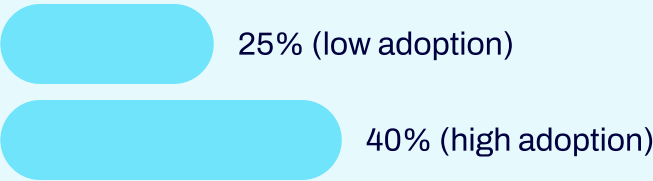
eSIM connections were recorded in 2021 across smartphones, smartwatches, laptops, and tablets. GSMA Intelligence

013

**3.4 billion**

eSIM connections are estimated by 2025. GSMA Intelligence

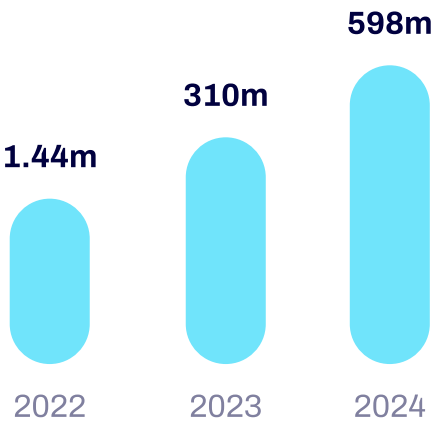
014



2025: 25% (low adoption) to 40% (high adoption) of smartphone connections are expected to use eSIM technology. GSMA Intelligence

015-017

Smartphone Connections Using eSIM



018

Smartphone Connections Using eSIM in 2025: 1 billion eSIM smartphone connections, almost 18% up (Mobilise) from 850 million estimated by the GSMA in 2022.

019

Smartphone eSIM connections double every year (2023-2025). Mobilise

020

**594% increase**

in smartphone eSIM connections occurred between 2022 and 2025. Mobilise

021



**50%** of all smartphone connections are estimated to use eSIM technology by 2028. GSMA Intelligence

022

2030: baseline scenario: 76% of smartphone connections (6.9 billion devices), low adoption scenario: 61% of smartphone connections (5.6 billion devices), high adoption scenario: 88% of smartphone connections (8 billion devices).



02

# Global eSIM Market Growth and Regional Dynamics

023-027

Global Adoption of eSIM by Country (2019–2024)

Total number of countries adopting eSIM and year-on-year growth rate.



Mobilise, based on GSMA Intelligence

028

413% increase

in the number of countries that adopted eSIM from 2018 to 2024. Mobilise, based on GSMA Intelligence.

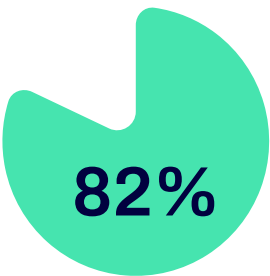
North America

029

2024 market share: between 35% (MRA) and 40.2% (imarc) of the global eSIM market share.

030

82% of North America's eSIM market revenue in 2024 came from the United States. imarc



031

North America's eSIM market is expected to grow at a CAGR of 8.7% from 2025 to 2032. SkyQuest

Europe

032



USD 2.57 billion in revenue

was generated by the European eSIM market in 2023. Grand View Research.

033



The United Kingdom, Germany, and France emerged as the primary revenue-generating nations in Europe in 2021. SkyQuest

034



France is expected to be the fastest-growing eSIM market globally over the next several years. SkyQuest

038

In 2025, APAC has approximately 9% eSIM penetration rate. GSMA Intelligence

039

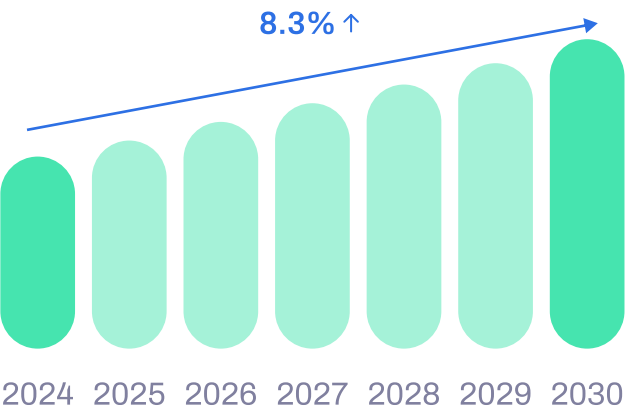
APAC's percentage of global smartphone connections will rise from 24% in 2023 to 55% in 2030. GSMA Intelligence

040

China is expected to become the largest eSIM market in the world by 2030, with 1.5 billion eSIM connections. GSMA Intelligence

035

The European eSIM market is expected to grow at a CAGR of 8.3% from 2024 to 2030.



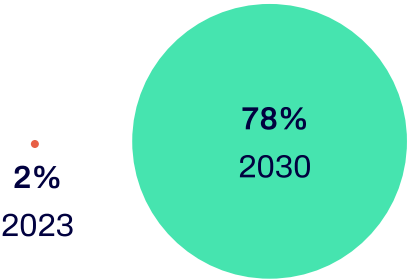
Grand View Research

036



Italy is projected to register the highest CAGR in Europe from 2024 to 2030. Grand View Research

041



eSIM penetration in APAC is expected to increase dramatically from 2% in 2023 to 78% in 2030. GSMA Intelligence

Latin America, Middle East & Africa

042

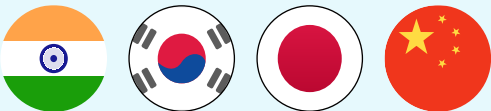
Most of the 20 new eSIM-supporting countries in 2023 were countries from Africa. GSMA Intelligence

043

Argentina is expected to register the highest CAGR from 2024 to 2030 in Latin America. Grand View Research

Asia Pacific

037



The Asia-Pacific region is the fastest-growing eSIM market globally, driven by rising consumer demand across India, South Korea, Japan, and China. GSMA Intelligence

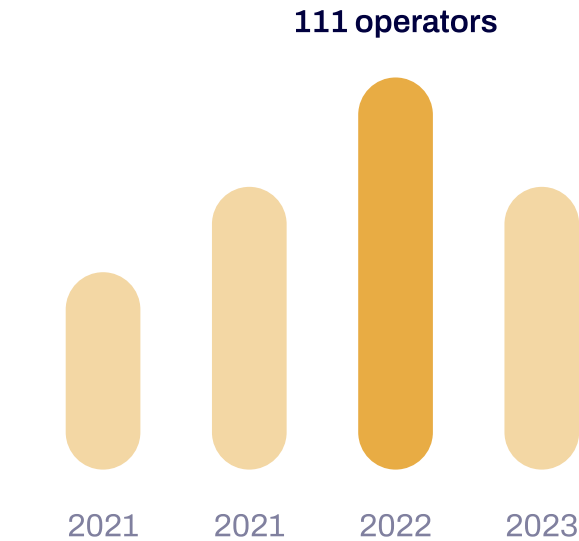


03

# eSIM Adoption by Mobile Operators

044

The peak of eSIM adoption by operators occurred in 2022, with 111 new operators launching consumer eSIM offerings.



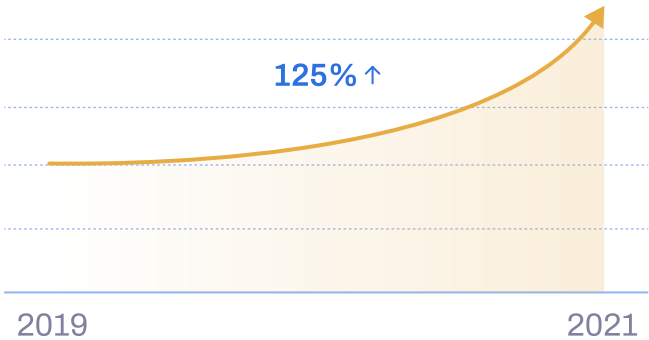
Mobilise, based on GSMA Intelligence

048

Data shows that the launch of eSIM-only iPhones in the US had no measurable impact on consumer churn. GSMA Intelligence

049

Between 2019 and 2021, the operator adoption of consumer eSIM increased by 125%.



Mobilise, based on GSMA

045

441 operators worldwide

support eSIM, including MNOs, MVNOs, and international roaming services as of June 2024. GSMA Intelligence

050

In 2018, 2 years after the introduction of eSIM to the consumer market, only 45 operators around the world had offered commercial eSIM services.

GSMA

051



The United States has the highest eSIM penetration globally, with around 30% of consumers using eSIM technology.

GSMA Intelligence

046

Traditional carriers could face up to \$11 billion in lost roaming revenue due to consumers shifting to digital-first providers.

Mobilise, based on GSMA Intelligence.

047

90% of operators were expected to launch eSIM offerings by 2025, with momentum expected to peak between 2021 and 2022. GSMA Intelligence

052

Between 2021 and 2023, the operator adoption of consumer eSIM increased by over 72%.

Mobilise, based on GSMA

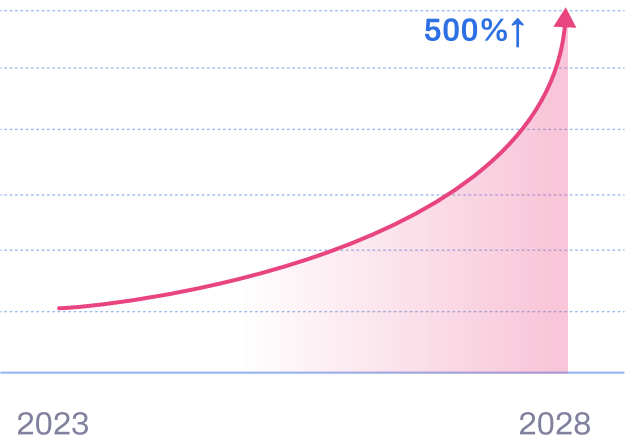


04

# eSIM in the Travel Sector

053

Retail spending on travel eSIM services is expected to grow by 500% between 2023 and 2028. Kaleido Intelligence



Kaleido Intelligence

054



Global travel eSIM market value is projected to reach **\$10 billion by 2028**, representing over 80% of the entire travel SIM expenditure.

Kaleido Intelligence

055

The average spend per trip is \$16 for travel eSIMs compared to \$41 for traditional roaming services.



Kaleido Intelligence

056



9 in 10 travellers are willing to use travel eSIMs if provided the option.

Mobilise Travel Survey 2023

057

In 2022, Brits accumulated over £539 million (\$673 million) in unexpected roaming charges.

Uswitch

058



Significant growth in travel eSIM adoption has been observed in India, Brazil, UAE, Australia, Malaysia, and Singapore. Kaleido Intelligence

059



Hong Kong, Malaysia, China, and Singapore lead in the physical travel SIM purchases. Kaleido Intelligence

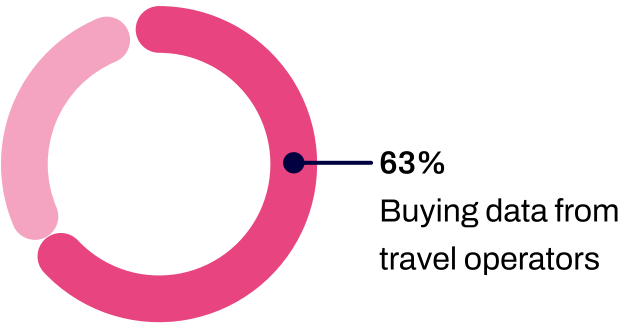
060

71% of Millennials and 69% of Gen Z are likely to consider purchasing a travel eSIM.

Mobilise Travel Survey 2023



061



**63% of Gen Z travellers** are interested in buying data from travel operators such as airlines or booking sites.  
*Mobilise Travel Survey 2023*

065

**75% of travellers** secure travel SIM or eSIM connectivity before their trip. *Kaleido Intelligence*

066



20% of travellers of travellers opt not to use mobile data abroad, relying solely on public Wi-Fi or staying disconnected.  
*Mobilise Travel Survey 2023*

062



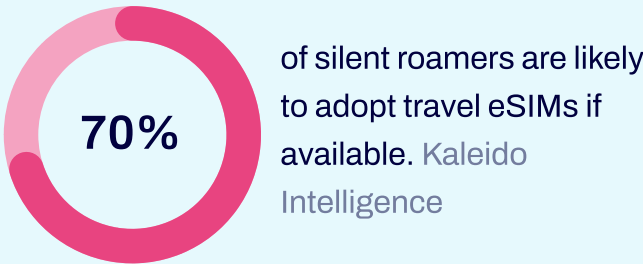
**27%** of travellers would use roaming if it were cheaper.  
*Kaleido Intelligence*

067



**Over 50%** of users seek alternatives to roaming when costs reach \$3-5 per day. *Kaleido Intelligence*

063



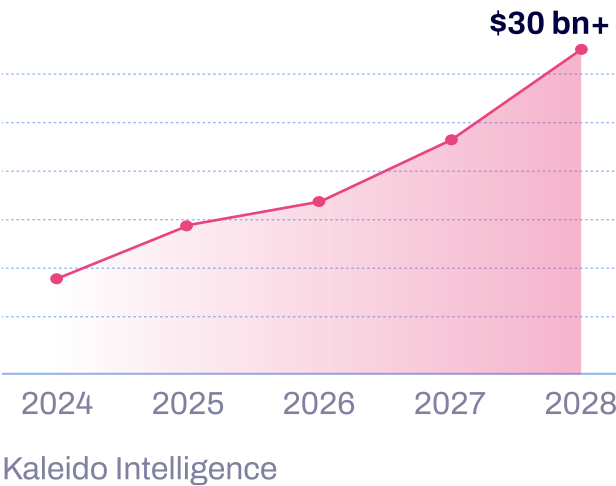
**70%** of silent roamers are likely to adopt travel eSIMs if available. *Kaleido Intelligence*

064

**22% of travellers** of travellers opt not to use mobile data abroad, relying solely on public Wi-Fi or staying disconnected.  
*Mobilise Travel Survey 2023*

068

Projected retail spending on travel connectivity services is expected to exceed \$30 billion by 2028.





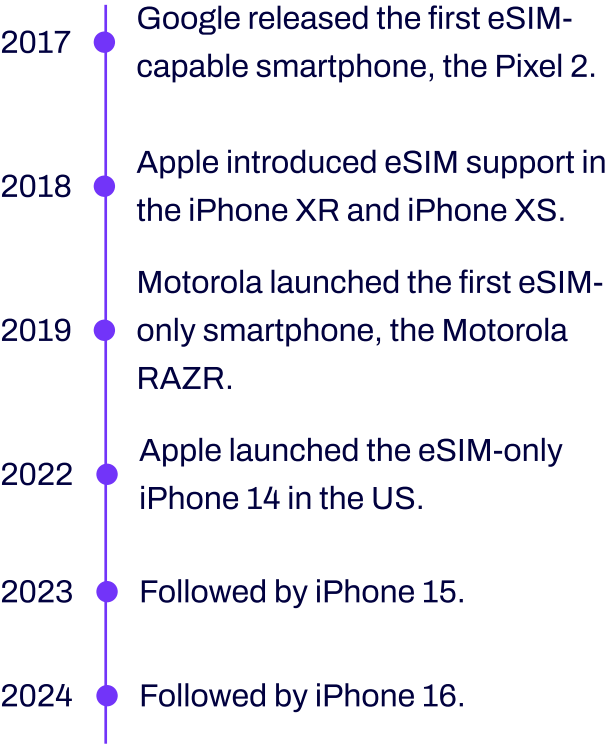
05

# OEM & Device Support

069

eSIM technology was launched in 2010 for the IoT market and approved for consumer devices in 2016. Mobilise, eSIM history

070-074

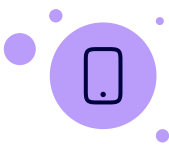


Mobilise, eSIM History

075

\$200

is approximately the most affordable eSIM-compatible smartphone in 2025. Mobilise, Most Affordable eSIM Smartphone



076

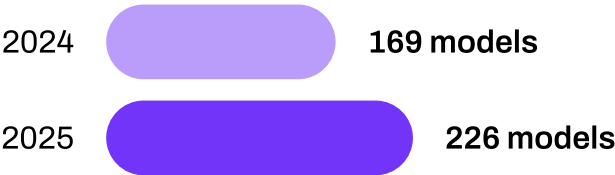
In 2021, over 80% of manufacturers planned to adopt eSIMs by 2025, but by April 2025, only 25 brands (10%) had adopted eSIM technology. GSMA Intelligence

077

eSIM device shipments in 2022 were estimated to be between 350 million and 382 million, with a total market of 427 million units. SkyQuestt, TCA

078

eSIM-compatible smartphone models grew from 169 in April 2024 to 226 in April 2025, reflecting a 33% YoY increase.



Mobilise, eSIM Statistics

079

293 million units

eSIM smartphone units were approximately shipped in 2022. ABI Research

080

The total available eSIM devices in 2023 reached 439.5 million, with a total of 986 million devices in the market. TechCabal

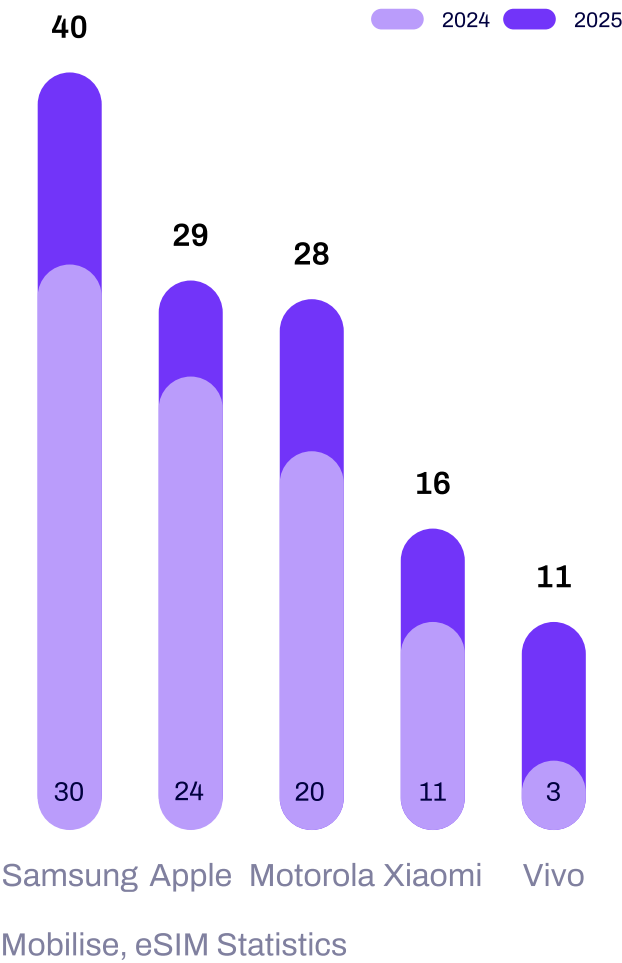
081

514 million units

eSIM devices were estimated to be in the market in 2024. TCA

082-083

Top eSIM OEMs & Model Growth in 2025



084

New OEMs in the eSIM Market (2024-2025):  
Asus (3 devices), Nothing Tech (1 device), TCL (1 device). Mobilise, eSIM Statistics

080

503 million units

of eSIM devices were shipped in 2024, growing, marking a 35% growth year-on-year. TCA

085

The total available market for traditional SIMs remained stable at 3.7 billion units in 2024.

TCA

087

3.5 billion devices

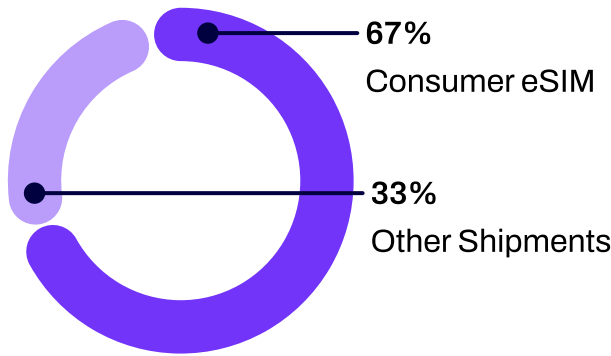
will be leveraging eSIM technology by 2027. TechCabal

088

xSIM-capable device shipments are projected to exceed 9 billion units by 2030, with a 22% CAGR from 2024 to 2030. Counterpoint

089

Annual shipments of eSIM devices are expected to reach 880.6 million devices by 2028, with consumer eSIMs making up 67% of shipments (~590 million units). ABI Research, Mobilise, eSIM Statistics



Mobilise, eSIM Statistics

090

Nearly 70%

of all cellular devices are expected to support eSIM technology by 2030.

Amdocs, LightReading

091

14 billion devices

are the projected to be eSIM-compatible by 2030, and this will account for 82% of all smartphone shipments. Statista

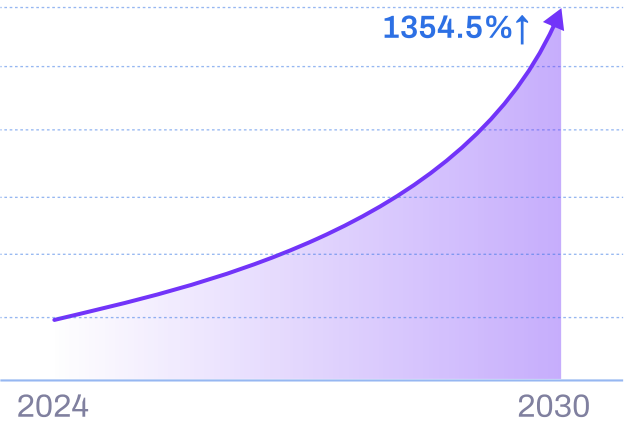
093



The smartwatch eSIM market is projected to grow from USD 2.8 billion in 2023 to USD 10.1 billion by 2032 (CAGR of 15.3%). DataIntelto

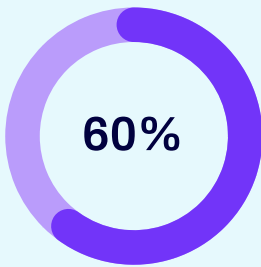
094

Projected eSIM device demand by 2030 is estimated at 16 billion devices, a 1354.5% increase from 2024.



Juniper Research, Mobilise, eSIM Statistics

092



of all smartphone unit sales are expected to be eSIM-compatible by 2025.

GSMA Intelligence

095

By 2025, 99% of smartwatches are expected to be eSIM-compatible. Amdocs

096



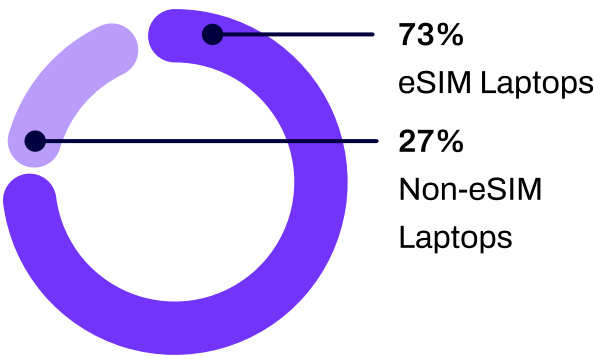
100%

eSIM-compatibility is projected for smartwatches and drives by 2030.

Statista

097

73% of laptops are expected to support eSIM by 2025.



Mobilise, eSIM Laptops

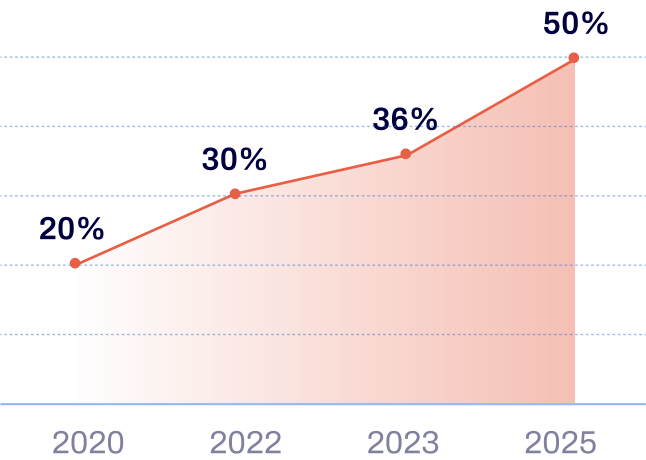


06

# Consumer eSIM Awareness & Adoption

098-101

eSIM Awareness between 2020 & 2025



106

58% of consumers

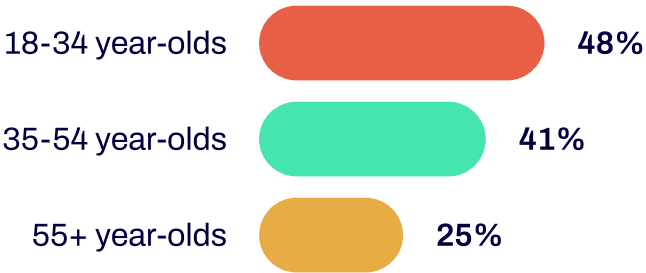
in developed markets such as UK, US and Australia are aware of eSIM. Statista

102

Awareness by region in 2022 varied between 26% in the UK and 48% in South Korea. GSMA

103

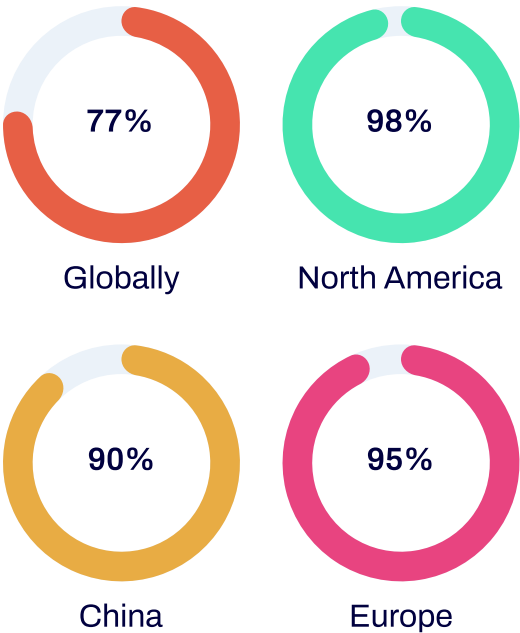
eSIM Awareness by age group



GSMA

107

Projected eSIM Adoption in 2030



GSMA

108

eSIM users are projected to grow from 40 million in 2024 to 215 million by 2028. Juniper Research

109

Less than 1% of eSIM-equipped smartphones actively used eSIM technology in 2022. LightReading

110

There was a 130% surge in eSIM profile downloads in 2022. TCA

104

54% of non-users are interested in adopting eSIM. GSMA

105

19% of eSIM-aware consumers actively use eSIM. eSIM Summit, MWC Barcelona 2025




07

# Environmental Impact of eSIM



111

2012 SIM card shipments, estimated at 2 billion units, contributed to approximately 35 grams of CO2e per card. ICMA

 = **35g CO2e**

117



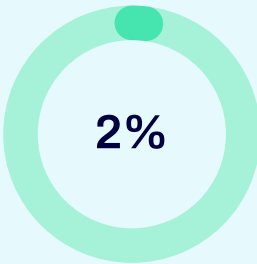
of plastic SIM emissions stem from production and logistics.  
Fraunhofer Institute

112

 **2012 SIM card = 70,000 tons CO2e emissions**

Mobilise, Sustainability in Telecommunication Industry

118



of eSIM emissions stem from production and logistics. They come from computing power and energy related to QR code transmission.  
Fraunhofer Institute

113

**140,000 tonnes of CO2e**

emissions resulted from 4.5 billion SIM card shipments in 2024. Mobilise, Sustainability in the Telecommunication Industry

119

 **11% of consumers**

consider sustainability an important factor in their decision-making. Amdocs

114-116

**Carbon footprint of eSIM & plastic SIM cards.**

Plastic SIM cards	<b>229g</b>	
eSIM	<b>123g</b>	<b>46% ↓</b>

Fraunhofer Institute



Simplified mobile connectivity solutions


# About Us


Mobilise provides innovative, modular software solutions for telecoms and beyond, enabling businesses to offer digital-first customer experiences. With a focus on flexibility and engagement, our solutions empower companies to streamline operations, adapt quickly, and exceed customer expectations.

Learn more about how Mobilise can help you drive telecom innovation with our digital telecoms HERO®.

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