

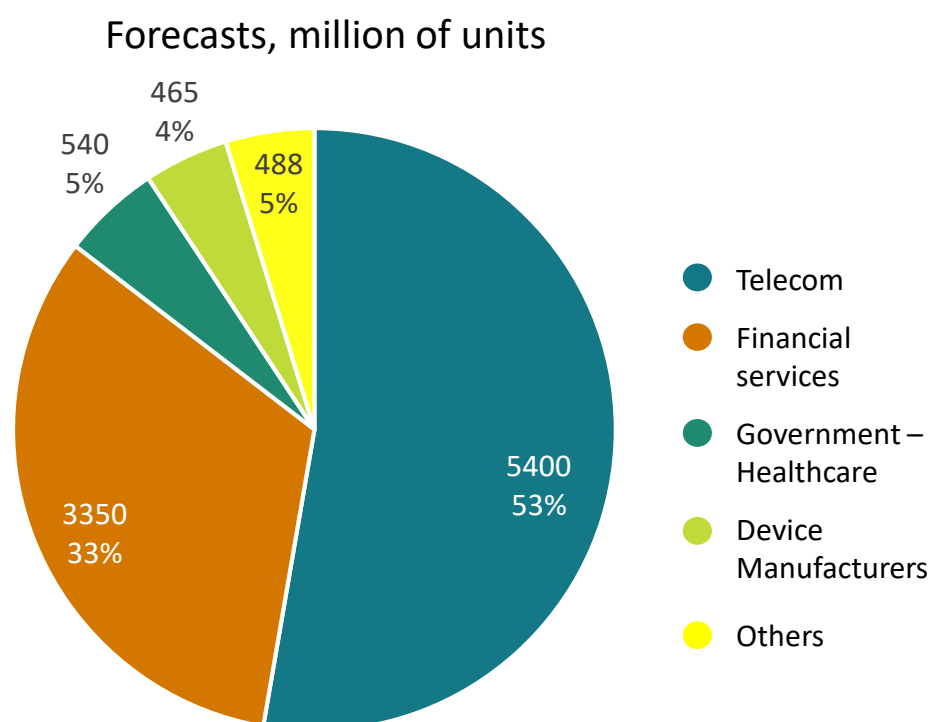
Secure elements market forecasts

2019-2020 worldwide figures

A **secure element** contains a certified microcontroller and embedded software.

It plays a vital role in ensuring our **digital security and privacy**.

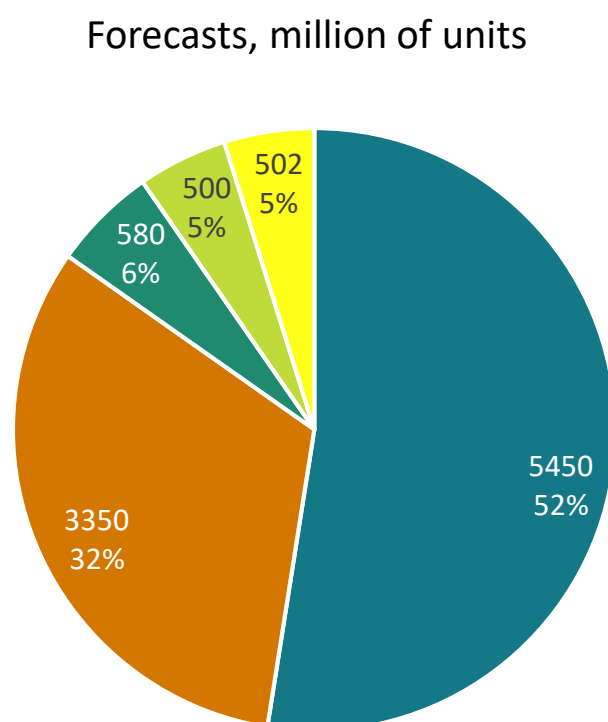
2019



In 2019, **10,24 bn** secure elements will be shipped

(10,23 bn in 2018)

2020



The market growth will reach **+1,4%** in 2020

(+0,1% in 2019)

Financial Services



3,3 bn secure elements will be shipped in 2019

In 2019 the overall growth is estimated to reach +4,4% which represents 140 million units. The market is driven by a mix of renewal and migration.

This segment accounts for cards for payment services, loyalty services and social cards with payment application.



Telecom

5,4 bn of SIM cards will be shipped in 2019

The consolidation of MNOs which is impacting an already mature market, a turn lower in demand is expected for 2019 representing about 5.4 billion units shipped.

This segment accounts for SIM cards, i.e. secure elements with a SIM application.

Growth Drivers

Device Manufacturers



465 M secure elements will be shipped in 2019

Despite the weak growth of smartphone shipments, a positive trend is expected. 465 million eSE will be shipped in 2019 and the growth is to continue in 2020 (+7.5% YoY).

This segment accounts for mobile phones, tablets, navigation devices and other connected devices that include an embedded secure element without SIM application.



Government & Healthcare

540 M secure elements will be shipped in 2019

The sector sustains an accelerated growth (+8% expected in 2019), driven by the implementation of many identity programmes and product renewal around the globe.

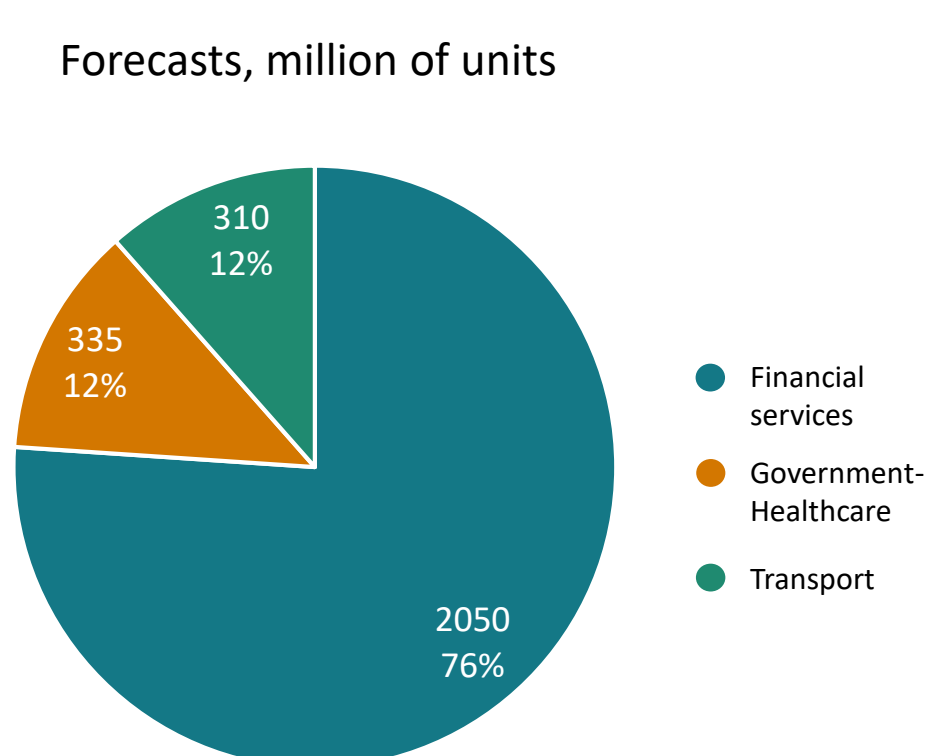
This segment accounts for cards issued by governmental bodies for citizens identification (travel, ID and healthcare documents) and online services and cards issued by private health insurance companies.



Contactless figures

Mobility and contactless transactions are key drivers for growth, thanks to their **convenient and secure** user experience. Wearables are also seen as a convenient form factor for payment.

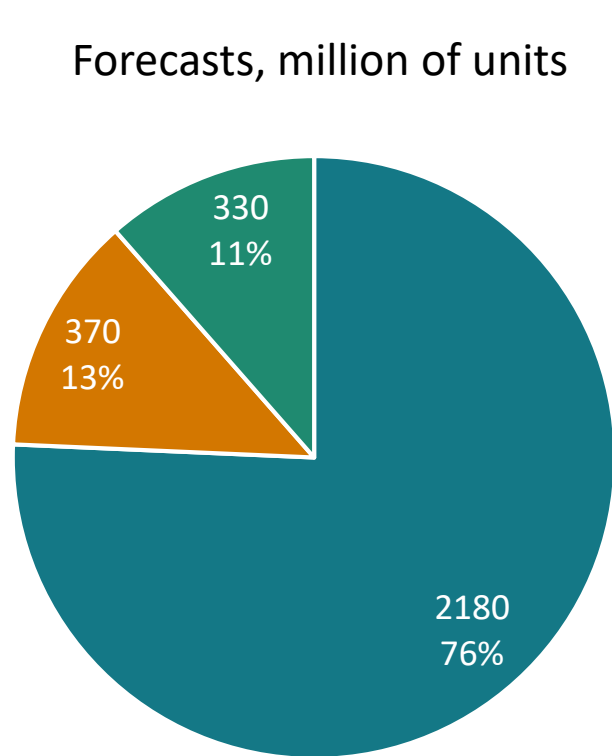
2019



The **contactless** market will increased by **20%** in 2019

(+14,3% in 2018)

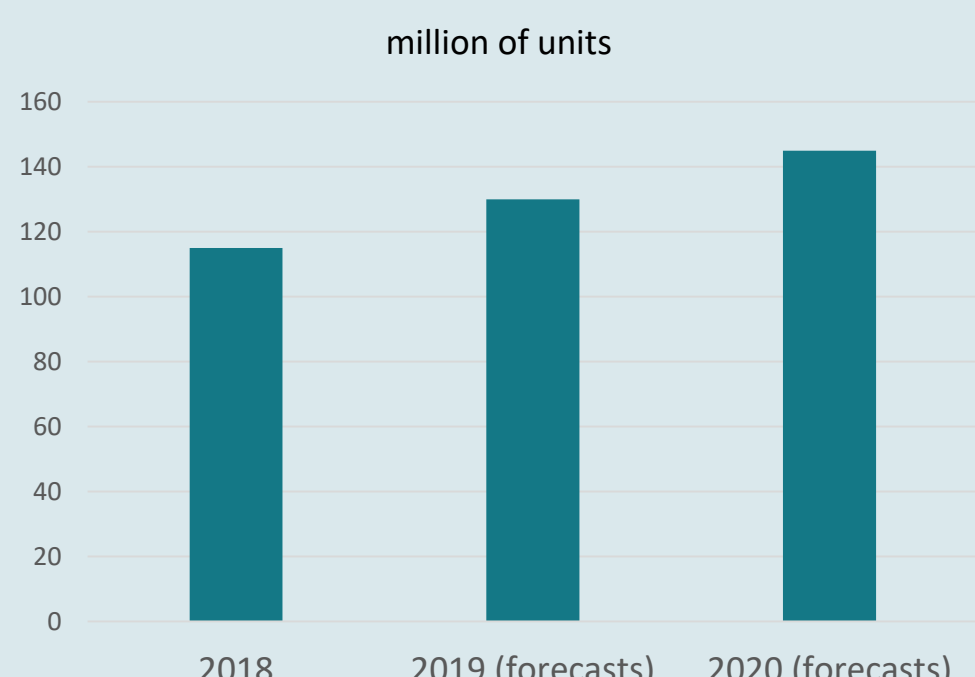
2020



In 2020, **2,8 bn** **contactless** secure elements will be shipped

(2,2 bn in 2018)

Industrial and automotive IoT



In 2019, shipments of secure elements for connected cars and smart meters using cellular connectivity will reach around **130 million** units in 2019



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