

# **eSIM Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Hardware and Software & Services), Type (Consumer eSIMs, IoT eSIMs, and Travel eSIMs), and Geography**

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## **Abstracts**

The eSIM market size was valued at US\$ 5.51 billion in 2024 and is expected to reach US\$ 17.98 billion by 2031; it is estimated to register a CAGR of 18.7% during 2025-2031.

The eSIM market in South America is gaining momentum as operators and consumers alike embrace its operational and technological advantages. Across the region, mobile operators are actively encouraging the migration from physical SIM cards to eSIMs to reduce logistics, inventory, and storage costs. Furthermore, eSIMs enable users to access the full capabilities of 5G Standalone networks, a critical advantage as countries expand their digital infrastructure.

In Brazil, this shift is particularly pronounced. Operators such as TIM are leading the charge by simplifying the eSIM transition process for customers. In September 2024, TIM launched a dedicated portal that allows users to exchange their physical SIM cards for eSIMs at no cost. Customers need only enter basic information—such as their CPF and device type—after which they receive an activation code to complete the migration. This initiative not only enhances customer convenience but also supports broader efforts to modernize telecom services nationwide. As Brazil continues to expand 5G coverage, the demand for eSIM-compatible devices and services is expected to grow further.

Argentina has also emerged as a promising market for eSIM adoption. The rapid

increase in smartphone usage has laid the foundation for widespread eSIM integration. Additionally, the travel sector's pivot to digital-first services has heightened interest in flexible connectivity options. Travelers increasingly prefer eSIMs for their ability to switch networks seamlessly, a feature that is particularly attractive in Argentina's dynamic mobile landscape.

In the rest of South America, although adoption rates vary by country, regional operators are beginning to recognize eSIM's potential to enhance operational efficiency and customer satisfaction. As digital transformation progresses and demand for agile connectivity grows, the eSIM ecosystem in the rest of SAM eSIM market growth.

Brazil's eSIM market is expanding rapidly, driven by a surge in international tourism and a robust digital infrastructure. In 2024, Brazilian tourism revenue reached a record USD 7.341 billion, surpassing even the 2014 FIFA World Cup figures. This 6.28% year-on-year growth is closely tied to a 12.6% rise in international arrivals, totaling 6.65 million visitors. The government's National Tourism Plan has played a pivotal role in positioning Brazil as a premier travel destination in SAM. As the region's largest economy, Brazil benefits from a well-established telecommunications network. Investments in 5G infrastructure, such as TIM Brasil's partnership with Nokia in August 2024 to expand coverage across 15 states, further enhance mobile connectivity nationwide. For travelers, eSIM technology offers a seamless alternative to traditional SIM cards, allowing them to activate digital SIMs either in advance or immediately upon arrival. This eliminates the need for physical SIM purchases and ensures uninterrupted mobile access. With the confluence of rising tourism, government support, and telecom innovation, Brazil is well-positioned to lead eSIM adoption, benefiting both international visitors and local operators.

Giesecke Devrient GmbH, Telefonica SA, Deutsche Telekom AG, IDEMIA France SAS, Infineon Technologies AG, Vodafone Group Plc, NXP Semiconductors NV., KORE Wireless, STMicroelectronics NV, and Thales SA are among the top companies profiled in the global eSIM market report.

The overall eSIM market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the eSIM market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers,

market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the eSIM market.

#### Reason to buy

Save and reduce time carrying out entry-level research by identifying the growth, size, leading players, and segments in the global eSIM market.

Highlights key business priorities in order to assist companies to realign their business strategies

The key findings and recommendations highlight crucial progressive industry trends in the global eSIM market, thereby allowing players across the value chain to develop effective long-term strategies

Develop/modify business expansion plans by using substantial growth offering developed and emerging markets

Scrutinize in-depth global market trends and outlook coupled with the factors driving the market, as well as those hindering it

Enhance the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing and distribution

#### The List of Companies - eSIM Market

Giesecke Devrient GmbH

Telefonica SA

Deutsche Telekom AG

IDEMIA France SAS

Infineon Technologies AG

Vodafone Group Plc

NXP Semiconductors NV.

KORE Wireless

STMicroelectronics NV

Thales SA.

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