

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

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Abstracts

The Europe eSIM market is on a trajectory of significant growth, projected to reach approximately US\$ 4,681.79 million by 2031, up from US\$ 1,549.90 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 17.4% from 2025 to 2031, driven by an increasing demand for flexible and reliable mobile connectivity solutions, particularly for travelers.

Executive Summary and Market Analysis

The eSIM market in Europe is rapidly evolving, fueled by the rising need for convenient and travel-friendly mobile connectivity. A notable development occurred in June 2025 when Vodafone launched a digital travel platform that features a Travel eSIM service, providing mobile data access in over 200 destinations across 700 networks worldwide. This Travel eSIM offers a practical alternative to traditional roaming, allowing users to maintain connectivity without the hassle of swapping physical SIM cards. To enhance its service offering, Vodafone plans to bundle the Travel eSIM with additional products such as travel insurance and is forming strategic partnerships, including one with Uber One, which will offer Vodafone Travel eSIMs in 44 European countries as part of a promotional package for its members.

In March 2025, eSIM Prime, a digital SIM provider based in the US, introduced enhanced regional data plans that cover Europe and over 190 countries globally. These plans are tailored to provide travelers with affordable, flexible, and eco-friendly

connectivity options, catering to the growing demographic of remote workers, tourists, and international business travelers.

SimCorner also contributed to the market's expansion by launching unlimited data eSIM plans for Europe in May 2025. This initiative addresses the increasing demand for high-usage data solutions, particularly for travelers with extended itineraries across multiple countries. SimCorner aims to position itself as a leading provider of global travel connectivity solutions.

These initiatives underscore Europe's emergence as a hub for eSIM innovation, with both telecom giants and digital startups investing in advanced solutions. The region is rapidly transitioning towards seamless, digital-first mobile experiences that eliminate the challenges associated with traditional SIM-based connectivity while traveling.

Strategic Insights

Market Segmentation Analysis

The Europe eSIM market can be segmented based on components and types. In terms of components, the market is divided into hardware and software & services, with the hardware segment holding a larger market share in 2024. By type, the market is categorized into consumer eSIMs, IoT eSIMs, and Travel eSIMs, with consumer eSIMs dominating the market in 2024. The consumer eSIM segment is further divided into sub-segments including smartphones, connected cars, wearables, laptops, tablets, and others.

Market Outlook

The adoption of eSIM technology is steadily gaining traction and is expected to replace physical SIM cards as the primary method of mobile service authentication. The fully digital nature of eSIM technology offers numerous advantages, driving transformational changes across various industries, particularly in the travel sector. According to data from Mobilise Global in 2023, travel operators, especially airlines, have reported a 20% increase in ancillary revenue per passenger when ancillary services are offered during the booking process.

Vodafone's introduction of a digital travel platform centered around its Travel eSIM in June 2025 exemplifies the growing trend of providing affordable and reliable data connectivity to travelers, regardless of their mobile network provider. The Travel eSIM

allows users to add mobile data while retaining their existing phone number, ensuring seamless connectivity abroad. The onboarding process is user-friendly, enabling travelers to download an app or visit a website to customize or select a data plan and install the eSIM within minutes.

In today's digitally connected world, uninterrupted internet access is a critical factor for travelers, with 81% citing it as essential when choosing destinations. eSIM technology meets these needs by allowing seamless connections to local networks without the inconvenience of changing physical SIM cards or incurring high roaming fees. This ensures a smooth mobile experience throughout their travels. For travel operators, the digital capabilities of eSIM present new opportunities for revenue diversification and enhanced ancillary income, allowing businesses to embed connectivity solutions directly into their offerings.

Country Insights

The Europe eSIM market includes key countries such as Germany, the UK, France, Italy, Russia, and others, with Germany holding the largest market share in 2024. The German eSIM market is expanding as consumers increasingly seek seamless, digital-first mobile services. The elimination of physical SIM cards allows for instant activation and easy plan management, appealing to users who prioritize convenience and flexibility.

In May 2025, Berlin-based digital bank N26 entered the telecommunications sector with the launch of N26 SIM, a fully digital mobile service built on Vodafone Germany's 5G network. This service leverages eSIM technology, enabling users to activate mobile plans directly through the N26 app without the need for paperwork or physical SIM cards. The service includes unlimited domestic calls and texts, as well as free roaming within the EU and EEA, making it particularly attractive to digital natives and frequent travelers.

Company Profiles

Key players in the Europe eSIM market include KORE Wireless, Giesecke Devrient GmbH, IDEMIA France SAS, Infineon Technologies AG, NXP Semiconductors NV, STMicroelectronics NV, Telefonica SA, Thales SA, Vodafone Group Plc, and Deutsche Telekom AG. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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