

# **North America 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 North American eSIM market is poised for substantial growth, projected to reach approximately US\$ 7,277.37 million by 2031, up from US\$ 2,146.99 million in 2024. This growth trajectory indicates a compound annual growth rate (CAGR) of 19.3% from 2025 to 2031, driven by several key factors.

### **Executive Summary and Market Analysis**

The eSIM technology is revolutionizing mobile connectivity in North America, primarily due to the increasing demand for flexible and efficient connectivity solutions. As digitalization accelerates within the telecom sector and cross-border travel resumes, eSIMs are becoming increasingly popular. This technology allows users to activate mobile networks digitally, eliminating the need for physical SIM cards, which enhances user experience, particularly for travelers seeking convenience, security, and cost-effectiveness.

The resurgence of international travel to and from the United States and Canada has significantly boosted the demand for efficient mobile connectivity solutions. Companies like eTravelSim are responding to this demand by offering unlimited data plans tailored for US travelers, enabling them to maintain uninterrupted internet access without incurring hefty international roaming fees. This shift towards digital-first, contactless services is evident as consumers increasingly prefer solutions that allow for instant activation without the hassle of physical cards or documentation. Platforms such as

eTravelSim facilitate this process, allowing users to purchase and activate their eSIMs online with minimal effort. Similarly, Airalo provides extensive eSIM coverage across the US, offering affordable data plans ranging from 1 GB to 20 GB, and extends its services to numerous countries worldwide. Holafly is also recognized as a top choice for prepaid eSIM cards, particularly for travel to Mexico.

The trend of remote SIM provisioning is gaining momentum as both consumers and enterprises seek more flexible mobile connectivity options. This technology allows users to activate or switch carriers without needing a physical SIM card, enhancing convenience and expediting service deployment. For businesses, this means simplified device management and reduced operational complexity, especially for large-scale deployments. Consumers benefit from easier plan changes and seamless international travel experiences. As eSIM-compatible devices become more prevalent, the demand for remote provisioning is expected to rise, further supporting the transition to fully digital mobile services.

## **Strategic Insights**

### **Market Segmentation Analysis**

The North American 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 integration of artificial intelligence (AI) into eSIM connectivity solutions is significantly enhancing network performance and user experience. AI leverages real-time data, user behavior analytics, and current network conditions to optimize network selection, ensuring seamless connectivity. Continuous monitoring and analysis of network performance allow for dynamic switching between eSIM profiles, automatically selecting the most efficient network without user intervention. As of 2023, around 400 network operators are offering eSIM services, creating a robust foundation for AI-driven capabilities to expand across global markets.

AI also plays a crucial role in bolstering the security of eSIM technology. Advanced algorithms facilitate real-time threat detection, anomaly identification, and predictive risk mitigation, safeguarding sensitive user data during transmission. These capabilities ensure that eSIM connectivity remains secure and reliable, even in complex digital environments. Furthermore, AI streamlines eSIM provisioning and lifecycle management across multiple devices, simplifying operations for service providers and enabling efficient remote management of large device fleets without the logistical challenges associated with physical SIM cards. AI-powered activation reduces setup time and complexity, enhancing the overall user experience and minimizing operational costs. These innovations position AI-enabled eSIM technology as a key driver of future-ready, intelligent connectivity ecosystems, paving the way for growth in the global eSIM market.

## Country Insights

The North American eSIM market is comprised of the US, Canada, and Mexico, with the US holding the largest market share in 2024. The US eSIM market is witnessing rapid innovation, particularly in the travel segment. For instance, in March 2025, HOAM launched a customized eSIM designed for travelers, allowing them to save up to 70% on international coverage while maintaining high-speed service quality. Earlier, in January 2025, Faye, a travel insurance platform, introduced a fully digital travel eSIM in collaboration with Gigs, integrating connectivity solutions with insurance plans. This eSIM covers over 190 countries, eliminating roaming charges and allowing users to manage both insurance and connectivity through a single app. These developments underscore the growing demand for integrated, cost-effective, and digitally driven travel solutions in the evolving US eSIM market.

## Company Profiles

Key players in the North American 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, among others. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and deliver innovative products to consumers.

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