

# **South & Central 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 eSIM market in South and Central America is poised for significant growth, with projections indicating that the market size will reach approximately USD 396.43 million by 2031, up from USD 167.04 million in 2024. This growth trajectory reflects a compound annual growth rate (CAGR) of 14.8% from 2025 to 2031, highlighting the increasing adoption of eSIM technology across the region.

## **Executive Summary and Market Analysis**

The momentum behind the eSIM market in South America is driven by both mobile operators and consumers who are recognizing the operational and technological benefits of eSIMs. Mobile operators are actively promoting the transition from traditional physical SIM cards to eSIMs, which helps reduce costs associated with logistics, inventory, and storage. Additionally, eSIMs facilitate access to the full capabilities of 5G Standalone networks, which is crucial as countries in the region enhance their digital infrastructure.

In Brazil, the shift towards eSIM technology is particularly notable. Leading operators like TIM are simplifying the transition process for customers. In September 2024, TIM introduced a dedicated portal that allows users to exchange their physical SIM cards for eSIMs at no cost. Customers only need to provide basic information, such as their CPF (Cadastro de Pessoas Físicas) and device type, to receive an activation code for the migration. This initiative not only improves customer convenience but also aligns with

broader efforts to modernize telecommunications services across the country. As Brazil continues to expand its 5G coverage, the demand for eSIM-compatible devices and services is expected to rise significantly.

## **Strategic Insights**

### **Market Segmentation Analysis**

The South and Central America 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 share in 2024. By type, the market is categorized into consumer eSIMs, IoT eSIMs, and Travel eSIMs, with consumer eSIMs dominating the market share 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. By utilizing real-time data, user behavior analytics, and current network conditions, AI optimizes network selection, ensuring seamless and uninterrupted connectivity. Continuous monitoring and analysis of network performance allow for dynamic switching between eSIM profiles, automatically selecting the most efficient network without requiring user intervention.

As of 2023, approximately 400 network operators worldwide offer eSIM services, establishing a robust foundation for the scalability of AI-driven capabilities across global markets. AI also plays a crucial role in enhancing the security of eSIM technology. Advanced algorithms facilitate real-time threat detection, anomaly identification, and predictive risk mitigation, ensuring the protection of sensitive user data during transmission. These capabilities guarantee 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, improving the overall user experience and lowering operational costs.

## **Country Insights**

The South and Central America eSIM market comprises several key countries, including Brazil, Argentina, and other regions. Brazil is expected to hold the largest market share in 2024. The rapid expansion of Brazil's eSIM market is fueled by a surge in international tourism and a robust digital infrastructure. In 2024, Brazilian tourism revenue reached a record USD 7.341 billion, surpassing figures from the 2014 FIFA World Cup, with a year-on-year growth of 6.28% linked to a 12.6% increase in international arrivals, totaling 6.65 million visitors. The government's National Tourism Plan has been instrumental in positioning Brazil as a premier travel destination in South America.

As the largest economy in the region, 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 provides a seamless alternative to traditional SIM cards, allowing for the activation of digital SIMs either in advance or upon arrival, eliminating the need for physical SIM purchases and ensuring uninterrupted mobile access. With the convergence of rising tourism, government support, and telecom innovation, Brazil is well-positioned to lead in eSIM adoption, benefiting both international visitors and local operators.

## **Company Profiles**

Key players in the South and Central America 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, including expansion, product innovation, and mergers and acquisitions, to deliver innovative products to consumers and increase their market share.

## Contents

### **1. INTRODUCTION**

- 1.1 Report Guidance
- 1.2 Market Segmentation

### **2. EXECUTIVE SUMMARY**

- 2.1 Key Insights
- 2.2 Market Attractiveness

### **3. RESEARCH METHODOLOGY**

- 3.1 Secondary Research

### **4. SOUTH & CENTRAL AMERICA ESIM MARKET LANDSCAPE**

- 4.1 Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
  - 4.3.1 Mobile Network Operators (MNOs) and Mobile Virtual Network Operators (MVNOs):
  - 4.3.2 Device Manufacturers (OEMs):
  - 4.3.3 eSIM Platform Providers
  - 4.3.4 Regulatory and Standards Bodies:
  - 4.3.5 End-Users:
  - 4.3.6 List of Vendors in the Value Chain:

### **5. SOUTH & CENTRAL AMERICA ESIM MARKET - KEY MARKET DYNAMICS**

- 5.1 Market Drivers
  - 5.1.1 Rising Adoption in Smartphones
  - 5.1.2 Increasing Integration of eSIM in the Automotive Industry
  - 5.1.3 Growing Inclination for Cost-Saving Options
- 5.2 Market Restraints
  - 5.2.1 Regulatory Challenges
- 5.3 Market Opportunities
  - 5.3.1 Surge in Travellers eSIM

- 5.3.2 Expansion in IoT Devices
- 5.4 Future Trends
  - 5.4.1 AI in eSIM Connectivity Management
- 5.5 Impact of Drivers and Restraints:

## **6. ESIM MARKET - SOUTH & CENTRAL AMERICA ANALYSIS**

- 6.1 South & Central America eSIM Market Revenue (US\$ Million), 2021-2031
- 6.2 South & Central America eSIM Market Forecast Analysis

## **7. SOUTH & CENTRAL AMERICA ESIM MARKET ANALYSIS - BY COMPONENT**

- 7.1 Hardware
  - 7.1.1 Overview
  - 7.1.2 Hardware: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 7.2 Software and Services
  - 7.2.1 Overview
  - 7.2.2 Software and Services: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **8. SOUTH & CENTRAL AMERICA ESIM MARKET ANALYSIS - BY TYPE**

- 8.1 Consumer eSIMs
  - 8.1.1 Overview
  - 8.1.2 Consumer eSIMs: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 8.2 IoT eSIMs
  - 8.2.1 Overview
  - 8.2.2 IoT eSIMs: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 8.3 Travel eSIMs
  - 8.3.1 Overview
  - 8.3.2 Travel eSIMs: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **9. SOUTH & CENTRAL AMERICA ESIM MARKET ANALYSIS - BY CONSUMER ESIM APPLICATION**

## 9.1 Smartphones

### 9.1.1 Overview

9.1.2 Smartphones: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## 9.2 Connected Cars

### 9.2.1 Overview

9.2.2 Connected Cars: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## 9.3 Wearables

### 9.3.1 Overview

9.3.2 Wearables: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## 9.4 Laptops and Tablets

### 9.4.1 Overview

9.4.2 Laptops and Tablets: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## 9.5 Others

### 9.5.1 Overview

9.5.2 Others: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **10. SOUTH & CENTRAL AMERICA ESIM MARKET - COUNTRY ANALYSIS**

### 10.1 South & Central America

10.1.1 South & Central America eSIM Market - Revenue and Forecast Analysis - by Country

10.1.1.1 South & Central America eSIM Market - Revenue and Forecast Analysis - by Country

10.1.1.2 Brazil: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.2.1 Brazil: South & Central America eSIM Market Share - by Component

10.1.1.2.2 Brazil: South & Central America eSIM Market Share - by Type

10.1.1.2.3 Brazil: South & Central America eSIM Market Share - by Consumer eSIM

Application

10.1.1.3 Argentina: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.3.1 Argentina: South & Central America eSIM Market Share - by Component

10.1.1.3.2 Argentina: South & Central America eSIM Market Share - by Type

10.1.1.3.3 Argentina: South & Central America eSIM Market Share - by Consumer

## eSIM Application

10.1.1.4 Rest of South & Central America: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.4.1 Rest of South & Central America: South & Central America eSIM Market Share - by Component

10.1.1.4.2 Rest of South & Central America: South & Central America eSIM Market Share - by Type

10.1.1.4.3 Rest of South & Central America: South & Central America eSIM Market Share - by Consumer eSIM Application

## 11. COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning & Concentration

## 12. INDUSTRY LANDSCAPE

12.1 Overview

12.2 New Product Development

12.3 Partnerships and Collaboration

## 13. COMPANY PROFILES

13.1 KORE Wireless

13.1.1 Key Facts

13.1.2 Business Description

13.1.3 Products and Services

13.1.4 Financial Overview

13.1.5 SWOT Analysis

13.1.6 Key Developments

13.2 Giesecke Devrient GmbH

13.2.1 Key Facts

13.2.2 Business Description

13.2.3 Products and Services

13.2.4 Financial Overview

13.2.5 SWOT Analysis

13.2.6 Key Developments

13.3 IDEMIA France SAS

13.3.1 Key Facts

- 13.3.2 Business Description
- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments
- 13.4 Infineon Technologies AG
  - 13.4.1 Key Facts
  - 13.4.2 Business Description
  - 13.4.3 Products and Services
  - 13.4.4 Financial Overview
  - 13.4.5 SWOT Analysis
  - 13.4.6 Key Developments
- 13.5 NXP Semiconductors NV
  - 13.5.1 Key Facts
  - 13.5.2 Business Description
  - 13.5.3 Products and Services
  - 13.5.4 Financial Overview
  - 13.5.5 SWOT Analysis
  - 13.5.6 Key Developments
- 13.6 STMicroelectronics NV
  - 13.6.1 Key Facts
  - 13.6.2 Business Description
  - 13.6.3 Products and Services
  - 13.6.4 Financial Overview
  - 13.6.5 SWOT Analysis
  - 13.6.6 Key Developments
- 13.7 Telefonica SA
  - 13.7.1 Key Facts
  - 13.7.2 Business Description
  - 13.7.3 Products and Services
  - 13.7.4 Financial Overview
  - 13.7.5 SWOT Analysis
  - 13.7.6 Key Developments
- 13.8 Thales SA
  - 13.8.1 Key Facts
  - 13.8.2 Business Description
  - 13.8.3 Products and Services
  - 13.8.4 Financial Overview
  - 13.8.5 SWOT Analysis

- 13.8.6 Key Developments
- 13.9 Vodafone Group Plc
  - 13.9.1 Key Facts
  - 13.9.2 Business Description
  - 13.9.3 Products and Services
  - 13.9.4 Financial Overview
  - 13.9.5 SWOT Analysis
  - 13.9.6 Key Developments
- 13.10 Deutsche Telekom AG
  - 13.10.1 Key Facts
  - 13.10.2 Business Description
  - 13.10.3 Products and Services
  - 13.10.4 Financial Overview
  - 13.10.5 SWOT Analysis
  - 13.10.6 Key Developments

## **14. APPENDIX**

- 14.1 Word Index
- 14.2 About the Insight Partners

## List Of Tables

### LIST OF TABLES

Table 1. South & Central America eSIM Market Segmentation

Table 2. South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 3. South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Component

Table 4. South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Type

Table 5. South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Consumer eSIM Application

Table 6. South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 7. Brazil: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 8. Brazil: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Type

Table 9. Brazil: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Consumer eSIM Application

Table 10. Argentina: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 11. Argentina: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Type

Table 12. Argentina: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Consumer eSIM Application

Table 13. Rest of South & Central America: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 14. Rest of South & Central America: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Type

Table 15. Rest of South & Central America: South & Central America eSIM Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Consumer eSIM Application

Table 16. Company Positioning & Concentration

Table 17. List of Abbreviation

## List Of Figures

### LIST OF FIGURES

Figure 1. South & Central America eSIM Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: eSIM Market

Figure 4. South & Central America eSIM Market - Key Market Dynamics

Figure 5. Number of eSIMs Compatible Smartphones

Figure 6. Number of eSIM Smartphones Models Launched From 2018 to 2023

Figure 7. Impact Analysis of Drivers and Restraints

Figure 8. South & Central America eSIM Market Revenue (US\$ Million), 2021-2031

Figure 9. South & Central America eSIM Market Share (%) - by Component (2024 and 2031)

Figure 10. Hardware: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 11. Software and Services: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. South & Central America eSIM Market Share (%) - by Type (2024 and 2031)

Figure 13. Consumer eSIMs: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 14. IoT eSIMs: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 15. Travel eSIMs: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 16. South & Central America eSIM Market Share (%) - by Consumer Esims Application (2024 and 2031)

Figure 17. Smartphones: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Connected Cars: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 19. Wearables: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 20. Laptops and Tablets: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 21. Others: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 22. South & Central America eSIM Market Breakdown, by Key Countries, 2024 and 2031 (%)

Figure 23. Brazil: South & Central America eSIM Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 24. Argentina: South & Central America eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 25. Rest of South & Central America: South & Central America eSIM Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 26. Heat Map Analysis by Key Players

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