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Global Automotive Ethernet PHY IC Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Automotive Ethernet PHY IC market size was valued at US$ 1595 million in 2025 and is forecast to a readjusted size of US$ 3859 million by 2032 with a CAGR of 12.5% during review period.

An Automotive Ethernet PHY IC (Physical Layer Integrated Circuit) is a key component in in-vehicle Ethernet communication systems. It handles the conversion between digital data from the data link layer and electrical signals suitable for transmission over physical media such as twisted pair or coaxial cables. At the receiving end, it converts the signals back into digital form. It is widely used in automotive applications such as ADAS, infotainment systems, domain controllers, and autonomous driving networks, enabling high-speed, low-latency, and reliable in-vehicle communication.In 2025, global Automotive Ethernet PHY IC production reached approximately 203 M units, with an average global market price of around US$ 2.10 per unit. Annual production capacity is 240 M Units. Gross Profit Margin?65%.The automotive Ethernet PHY IC industry chain is structured across four main layers: upstream semiconductor materials and wafer fabrication, midstream chip design and manufacturing, downstream module integration by Tier 1 suppliers, and final deployment in OEM vehicle platforms. Upstream, silicon wafers, photomasks, and specialty analog process technologies (28nm?180nm mixed-signal nodes) form the foundation. Midstream is dominated by fabless design houses and IDM companies such as NXP, Broadcom, Marvell, and TI, which design PHY architectures and outsource or partially integrate manufacturing. Downstream Tier 1 suppliers integrate PHYs into ECUs, domain controllers, ADAS modules, and zonal architecture systems, which are then embedded into OEM vehicle electrical/electronic platforms.Automotive Ethernet PHY ICs are transitioning from a niche connectivity

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component into a core enabler of centralized vehicle computing architectures. Demand growth is driven less by price and more by increasing PHY count per vehicle as EVs and software-defined vehicles adopt zonal and gigabit Ethernet backbones. However, the market is structurally constrained by high technological barriers, long qualification cycles, and strong concentration among a few global suppliers. In the long term, value will shift from standalone PHY chips toward integrated networking solutions combining PHY, switch, and compute functions.

This report is a detailed and comprehensive analysis for global Automotive Ethernet PHY IC market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Data Rate / Speed and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Automotive Ethernet PHY IC market size and forecasts, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global Automotive Ethernet PHY IC market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global Automotive Ethernet PHY IC market size and forecasts, by Data Rate / Speed and by Application, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global Automotive Ethernet PHY IC market shares of main players, shipments in revenue ($ Million), sales quantity (Million Units), and ASP (US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive Ethernet PHY IC

To forecast future growth in each product and end-use market

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To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive Ethernet PHY IC market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Infineon Technologies AG, Nxp Semiconductors N.V., MaxLinear, Texas Instruments Incorporated, Renesas Electronics Corporation, Broadcom Inc, Marvell Technology, Qualcomm Incorporated, Realtek Semiconductor Corporation, Microchip Technology Incorporate, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Automotive Ethernet PHY IC market is split by Data Rate / Speed and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Data Rate / Speed, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Data Rate / Speed

100BASE-T1 PHY

1000BASE-T1 PHY

2.5GBASE-T1 PHY

10GBASE-T1 PHY

Market segment by Port Architecture

Single-Port PHY

Multi-Port PHY

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Market segment by Integration Level

- Stand-alone PHY IC
- PHY + Ethernet Switch
- PHY with MAC/Controller Integration

Market segment by Application

- OEM
- Tier 1 Suppliers
- Aftermarket

Major players covered

- Infineon Technologies AG
- Nxp Semiconductors N.V.
- MaxLinear
- Texas Instruments Incorporated
- Renesas Electronics Corporation
- Broadcom Inc
- Marvell Technology
- Qualcomm Incorporated
- Realtek Semiconductor Corporation

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Microchip Technology Incorporate

Novosense Microelectronics

Innosilicon

GigaDevice

VeriSilicon

Nationz Technologies

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Automotive Ethernet PHY IC product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automotive Ethernet PHY IC, with price, sales quantity, revenue, and global market share of Automotive Ethernet PHY IC from 2021 to 2026.

Chapter 3, the Automotive Ethernet PHY IC competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed

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emphatically by landscape contrast.

Chapter 4, the Automotive Ethernet PHY IC breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Data Rate / Speed and by Application, with sales market share and growth rate by Data Rate / Speed, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Automotive Ethernet PHY IC market forecast, by regions, by Data Rate / Speed, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Automotive Ethernet PHY IC.

Chapter 14 and 15, to describe Automotive Ethernet PHY IC sales channel, distributors, customers, research findings and conclusion.

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