

Global Automotive Ethernet TSN Switch 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 TSN Switch market size was valued at US\$ 226 million in 2025 and is forecast to a readjusted size of US\$ 743 million by 2032 with a CAGR of 18.6% during review period.

Automotive Ethernet TSN Switch is an in-vehicle Ethernet switching chip designed for automotive network backbones, integrating Ethernet switching, time-sensitive networking, time synchronization, priority traffic management, and deterministic forwarding functions into one system-level device. Compared with a general automotive TSN switch, this product definition emphasizes its role in vehicle Ethernet architecture, supporting reliable data exchange among zonal controllers, gateways, sensors, domain controllers, smart cockpit systems, and advanced driver-assistance modules under automotive-grade requirements. In 2025, production was 22 million units and the average price was USD 10 per unit. The industry's capacity utilization rate in 2025 was about 70%, and the average gross margin was around 53%. The upstream primarily consists of silicon wafers and wafer materials, packaging and test consumables, and high-precision semiconductor fabrication equipment such as lithography, etch, and ion implantation systems, with representative suppliers including SUMCO, GlobalWafers, Shin-Etsu, and Shanghai Silicon Industry Group; packaging and test suppliers include Amkor and JCET; equipment suppliers include ASML, Applied Materials, Lam Research, and AMEC. The midstream focuses on in-vehicle Ethernet switching architecture design, TSN protocol integration, time synchronization logic, traffic scheduling engines, firmware and driver development, automotive-grade reliability validation, functional safety adaptation, and interoperability testing, with emphasis on deterministic latency, stable multi-node communication, electromagnetic compatibility, and long lifecycle support. The downstream customers are passenger car and

commercial vehicle OEMs and in-vehicle system integrators, represented by BMW, Toyota, Volkswagen, BYD, and Geely.

The market outlook for Automotive Ethernet TSN Switch chips is increasingly promising as vehicles advance toward higher intelligence and centralized electrical/electronic architectures. The growing demand for deterministic latency, precise synchronization, and high-bandwidth in-vehicle communication is making TSN switches indispensable to next-generation automotive network backbones. Passenger vehicles are requiring more bandwidth for ADAS, domain controllers, and cockpit-fusion platforms, while commercial vehicles are accelerating adoption in fleet coordination, intelligent logistics, and electrified platforms. TSN technology also aligns closely with the shift toward software-defined vehicles, enabling cross-domain data orchestration and controllable network resource management. Over the next 5-10 years, Automotive Ethernet TSN Switch chips are expected to become a mainstream communication solution, supported by strong and sustained growth driven by automotive architecture upgrades.

This report is a detailed and comprehensive analysis for global Automotive Ethernet TSN Switch market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 TSN Switch market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Ethernet TSN Switch 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 TSN Switch market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Ethernet TSN Switch 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 TSN Switch

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

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive Ethernet TSN Switch 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 (Germany), NXP Semiconductors (Netherlands), Microchip Technology (USA), Analog Devices (USA), Broadcom (USA), Toshiba (Japan), Motorcomm Electronic Technology (China), Kungao Microelectronics (China), Ethernovia (USA), Realtek Semiconductor (Taiwan), etc.

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

Market Segmentation

Automotive Ethernet TSN Switch market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 Type

IEEE 802.1AS

IEEE 802.1Qbv

IEEE 802.1Qbu

Others

Market segment by Package

QFN/VQFN

BGA

Others

Market segment by Port Count

4 Ports

8 Ports

16 Ports

Others

Market segment by Application

Passenger Cars

Commercial Vehicle

Major players covered

Infineon Technologies (Germany)

NXP Semiconductors (Netherlands)

Microchip Technology (USA)

Analog Devices (USA)

Broadcom (USA)

Toshiba (Japan)

Motorcomm Electronic Technology (China)

Kungao Microelectronics (China)

Ethernovia (USA)

Realtek Semiconductor (Taiwan)

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 TSN Switch product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Automotive Ethernet TSN Switch competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automotive Ethernet TSN Switch 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 Type and by Application, with sales market share and growth rate by Type, 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 TSN Switch market forecast, by regions, by Type, 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 TSN Switch.

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

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