

Global Automotive-grade TSN Switch Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive-grade TSN Switch market size is expected to reach \$ 743 million by 2032, rising at a market growth of 18.6% CAGR during the forecast period (2026-2032).

Automotive-grade TSN Switch is a time-sensitive networking switch chip developed for automotive electronic systems, with its product definition centered on automotive-grade reliability, deterministic communication, functional safety adaptation, electromagnetic compatibility, wide-temperature operation, and long lifecycle supply. Compared with a general in-vehicle Ethernet TSN switch, it places greater emphasis on meeting vehicle-level validation requirements and supporting stable real-time data exchange among sensors, gateways, zonal controllers, domain controllers, smart cockpit systems, and advanced driver-assistance modules under harsh automotive operating conditions. 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 automotive-grade switch architecture design, TSN protocol integration, time synchronization logic, traffic scheduling engines, firmware and driver development, reliability validation, functional safety adaptation, electromagnetic compatibility testing, and interoperability verification, with emphasis on deterministic latency, stable multi-node communication, system safety, environmental robustness, 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-grade TSN switch chips is highly promising, driven by the rapid transition of vehicle architectures from distributed to centralized designs, which demands deterministic in-vehicle networking. As autonomous driving, sensor fusion, and domain-controller centralization accelerate, vehicles require ultra-low latency, high reliability, and precise time synchronization capabilities that position TSN as a foundational technology for next-generation E/E architectures. Over the next three to five years, rising intelligence levels in both passenger and commercial vehicles will expand TSN deployment and increase per-vehicle chip content, pushing the product into a fast-penetration phase. Given its high technical barriers, long certification cycles, and stable supply chain structure, the automotive-grade TSN switch chip market is expected to maintain strong momentum and durable growth.

This report studies the global Automotive-grade TSN Switch production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive-grade TSN Switch and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive-grade TSN Switch that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive-grade TSN Switch total production and demand, 2021-2032, (Million Units)

Global Automotive-grade TSN Switch total production value, 2021-2032, (USD Million)

Global Automotive-grade TSN Switch production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Automotive-grade TSN Switch consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Automotive-grade TSN Switch domestic production, consumption, key domestic manufacturers and share

Global Automotive-grade TSN Switch production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Automotive-grade TSN Switch production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Automotive-grade TSN Switch production by Application, production, value,

CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Automotive-grade TSN Switch market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive-grade TSN Switch market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive-grade TSN Switch Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive-grade TSN Switch Market, Segmentation by Type:

IEEE 802.1AS

IEEE 802.1Qbv

IEEE 802.1Qbu

Others

Global Automotive-grade TSN Switch Market, Segmentation by Package:

QFN/VQFN

BGA

Others

Global Automotive-grade TSN Switch Market, Segmentation by Port Count:

4 Ports

8 Ports

16 Ports

Others

Global Automotive-grade TSN Switch Market, Segmentation by Application:

Passenger Cars

Commercial Vehicle

Companies Profiled:

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)

Key Questions Answered:

1. How big is the global Automotive-grade TSN Switch market?
2. What is the demand of the global Automotive-grade TSN Switch market?
3. What is the year over year growth of the global Automotive-grade TSN Switch market?
4. What is the production and production value of the global Automotive-grade TSN Switch market?
5. Who are the key producers in the global Automotive-grade TSN Switch market?
6. What are the growth factors driving the market demand?

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