

Global Automotive TSN PHYs 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 TSN PHYs market size was valued at US\$ 101 million in 2025 and is forecast to a readjusted size of US\$ 257 million by 2032 with a CAGR of 14.6% during review period.

Automotive TSN PHYs are automotive-oriented Ethernet physical-layer chips designed for time-sensitive vehicle networks, providing stable signal transmission, link establishment, clock accuracy support, low-jitter communication, electromagnetic robustness, and reliable physical connectivity for in-vehicle Ethernet systems. Compared with general TSN Ethernet PHYs, this product definition emphasizes automotive operating conditions, including wide-temperature reliability, electromagnetic compatibility, low power consumption, long lifecycle supply, and stable communication between sensors, gateways, switches, domain controllers, zonal controllers, and edge nodes. In 2025, production was 35 million units and the average price was USD 2.8 per unit. The industry's capacity utilization rate in 2025 was about 70%, and the average gross margin was around 40%. Upstream, the key inputs include silicon wafers, wafers and packaging materials, lithography equipment, etching equipment, and ion implantation equipment, with representative suppliers such as Shin-Etsu Chemical, ASML, and Applied Materials providing core semiconductor materials and manufacturing equipment. The midstream segment focuses on automotive physical-layer circuit design, Ethernet signal conditioning, clock recovery, timing accuracy support, interface compatibility, analog front-end integration, verification, tape-out, packaging, testing, reliability validation, and software driver adaptation, which together determine signal integrity, jitter performance, link quality, electromagnetic compatibility, power consumption, reliability, and cost competitiveness. Downstream, Automotive TSN PHYs are mainly used in passenger cars and commercial vehicles, supporting in-

vehicle Ethernet backbones, zonal architectures, gateway systems, smart cockpit communication, assisted driving data links, chassis control, and real-time vehicle control networks, with representative customers including Toyota, Volkswagen, BYD, and Geely.

Automotive TSN PHYs demand will be driven by the need to make every in-vehicle Ethernet link more stable, not only by the growth of network bandwidth. In passenger cars, smart cockpit, gateway, assisted driving, and zonal control systems require low-jitter physical connections to keep synchronized communication reliable across multiple electronic domains. Commercial vehicles add stricter expectations for durability, diagnostics, safety monitoring, and long operating cycles. Product differentiation will depend on signal integrity, electromagnetic robustness, clock accuracy, low power consumption, automotive-grade reliability, interface compatibility, and stable supply across vehicle platform lifecycles.

This report is a detailed and comprehensive analysis for global Automotive TSN PHYs 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 TSN PHYs market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive TSN PHYs 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 TSN PHYs 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 TSN PHYs 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 TSN PHYs

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 TSN PHYs 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 Microchip Technology (USA), Infineon Technologies (Germany), NXP Semiconductors (Netherlands), Broadcom (USA), 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 TSN PHYs 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

100Mbps TSN PHYs

Gigabit TSN PHYs

Others

Market segment by Package

QFN

LQFP/TQFP

Others

Market segment by Port Count

4 Ports

8 Ports

16 Ports

Others

Market segment by Application

Passenger Cars

Commercial Vehicle

Major players covered

Microchip Technology (USA)

Infineon Technologies (Germany)

NXP Semiconductors (Netherlands)

Broadcom (USA)

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

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

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

Chapter 4, the Automotive TSN PHYs 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 TSN PHYs 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 TSN PHYs.

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

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