

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

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Abstracts

The global Automotive TSN PHYs market size is expected to reach \$ 257 million by 2032, rising at a market growth of 14.6% CAGR during the forecast period (2026-2032).

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 studies the global Automotive TSN PHYs production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive TSN PHYs 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 TSN PHYs that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

Global Automotive TSN PHYs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Automotive TSN PHYs 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive TSN PHYs 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 TSN PHYs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive TSN PHYs Market, Segmentation by Type:

100Mbps TSN PHYs

Gigabit TSN PHYs

Others

Global Automotive TSN PHYs Market, Segmentation by Package:

QFN

LQFP/TQFP

Others

Global Automotive TSN PHYs Market, Segmentation by Port Count:

4 Ports

8 Ports

16 Ports

Others

Global Automotive TSN PHYs Market, Segmentation by Application:

Passenger Cars

Commercial Vehicle

Companies Profiled:

Microchip Technology (USA)

Infineon Technologies (Germany)

NXP Semiconductors (Netherlands)

Broadcom (USA)

Motorcomm Electronic Technology (China)

Kungao Microelectronics (China)

Ethernovia (USA)

Realtek Semiconductor (Taiwan)

Key Questions Answered:

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

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