

Global Automotive TSN Switch Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GAF157BBA4FAEN.html>

Date: August 2026

Pages: 92

Price: US\$ 3,480.00 (Single User License)

ID: GAF157BBA4FAEN

Abstracts

According to our (Global Info Research) latest study, the global Automotive 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.

The Automotive TSN Switch is a system-level switch chip designed for in-vehicle Ethernet, integrating time-sensitive networking protocols and traffic scheduling units to deliver deterministic latency and high-reliability communication under automotive-grade requirements. 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 chip system architecture design, integration of switching and time-synchronization functions, firmware and driver development, and functional and interoperability testing, emphasizing automotive-grade time-sensitive traffic scheduling, deterministic latency guarantees and system-level reliability validation. The downstream customers are passenger car and commercial vehicle OEMs and in-vehicle system integrators, represented by companies such as BMW, Toyota, Volkswagen and Chinese firms like BYD and Geely. 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 automotive TSN switch market is entering a rapid growth phase driven by the acceleration of vehicle electrification, intelligent networking, and domain centralized

architectures. As Ethernet becomes the backbone of in-vehicle communication, TSN (Time-Sensitive Networking) technology provides deterministic latency and precise synchronization essential for ADAS, autonomous driving, and zonal controllers. With Tier-1 suppliers and semiconductor companies integrating TSN into automotive Ethernet platforms, the market is expected to expand significantly in the next five years, supported by large-scale mass production of centralized domain controllers and 10G automotive Ethernet.

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

Global Automotive 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 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 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 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 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 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-Port Type

8-Port Type

16-Port Type

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

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

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

Chapter 4, the Automotive 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 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 TSN Switch.

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

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