

# **Global TSN Ethernet 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 TSN Ethernet PHYs market size was valued at US\$ 226 million in 2025 and is forecast to a readjusted size of US\$ 527 million by 2032 with a CAGR of 12.7% during review period.

TSN Ethernet PHYs are Ethernet physical-layer chips designed for time-sensitive networking environments, providing signal transmission, link establishment, clock-related accuracy support, low-jitter communication, and stable physical connectivity for deterministic industrial and automotive Ethernet systems. Unlike TSN switch chips that focus on packet forwarding and traffic scheduling, TSN Ethernet PHYs emphasize physical-layer signal integrity, timing stability, electromagnetic robustness, power efficiency, and reliable data transmission between controllers, sensors, switches, gateways, and edge devices. In 2025, production was 88 million units and the average price was USD 2.5 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 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 transmission stability, jitter performance, link quality, protocol compatibility, power consumption, reliability, and cost competitiveness. Downstream, TSN Ethernet PHYs are mainly used in industrial automation and automotive applications, supporting factory control systems, robots, machine vision, smart vehicles, zonal architectures, and in-

vehicle Ethernet networks, with representative customers including Siemens, ABB, and BYD.

TSN Ethernet PHYs will become more relevant as deterministic networking moves closer to the physical connection layer. In industrial automation, controllers, drives, robots, and machine vision systems need not only scheduled traffic from switches, but also stable signal transmission, low jitter, and precise timing support at every Ethernet link. Automotive applications add similar requirements as zonal architectures and in-vehicle Ethernet connect sensors, gateways, and domain controllers under strict reliability conditions. Future product differentiation will depend on physical-layer robustness, clock accuracy, electromagnetic compatibility, power consumption, interface compatibility, and the ability to maintain stable communication in harsh operating environments.

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

Global TSN Ethernet 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 TSN Ethernet 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 TSN Ethernet 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 TSN Ethernet 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 TSN Ethernet 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

TSN Ethernet 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

Industrial Automation

Automobile

Others

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

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

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

Chapter 4, the TSN Ethernet 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 TSN Ethernet 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 TSN Ethernet PHYs.

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

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