

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

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## Abstracts

The global TSN Ethernet PHYs market size is expected to reach \$ 527 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

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

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

#### Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global TSN Ethernet 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 TSN Ethernet 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 TSN Ethernet PHYs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global TSN Ethernet PHYs Market, Segmentation by Type:

100Mbps TSN PHYs

Gigabit TSN PHYs

Others

#### Global TSN Ethernet PHYs Market, Segmentation by Package:

QFN

LQFP/TQFP

Others

#### Global TSN Ethernet PHYs Market, Segmentation by Port Count:

4 Ports

8 Ports

16 Ports

Others

#### Global TSN Ethernet PHYs Market, Segmentation by Application:

Industrial Automation

Automobile

Others

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

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