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Power Over Ethernet (PoE) Chipsets Market Report by Type (Power Sourcing Equipment (PSE) Chipset, Powered Devices (PD) Chipset), Standard (802.3af Standard, 802.3at Standard, 802.3bt Standard), Device Type (Network Cameras, VoIP Phone, Ethernet Switch and Injector, Wireless Radio Access Point, Proximity Sensor, and Others), Application (Connectivity, Infotainment, LED Lighting, Security, and Others), End-Use Sector (Residential, Commercial, Industrial), and Region 2024-2032

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Abstracts

The global power over ethernet (PoE) chipsets market size reached US$ 733.1 Million in 2023. Looking forward, IMARC Group expects the market to reach US$ 1,805.1 Million by 2032, exhibiting a growth rate (CAGR) of 10.2% during 2024-2032. The rising demand for cost-effective and efficient networking solutions, increased adoption of smart home automation and IoT devices, and the expanding utilization of IP telephony and IP cameras are driving the market growth.

Power over Ethernet (PoE) chipsets allow networking cables to deliver electrical power over an existing data connection to wired devices such as IP cameras, network switches, and Wi-Fi access points. These chipsets integrate power into a local area network (LAN) infrastructure, wherein the power is supplied in parallel with data over a single cable. This technology is instrumental in reducing the need for additional wiring, thereby saving on the costs and hassles of installation, while providing flexibility in the placement of powered devices. PoE chipsets are generally incorporated into the

powered device or the power supply, like an Ethernet switch. The robust nature of PoE chipsets enables them to accommodate the growing power requirements of various devices, ensuring their seamless operation. These chipsets are designed to detect the presence of PoE-enabled devices, determine the power requirement, and manage the power supply. They are also responsible for protecting the network equipment from overload, underpowering, or incorrect installation.

One of the factors driving the market represents the growing digital transformation in various sectors worldwide. As industries are shifting toward digital operations, there is a growing need for high-performance networking solutions. The rising popularity of LED lighting systems is also contributing to the growth of the market. LED lights powered by PoE are energy-efficient, easy to install, and can be managed remotely. As LED lights are widely utilized in smart buildings and cities, it is driving the demand for these chipsets. Furthermore, the increasing adoption of PoE in the healthcare sector is acting as another driver. PoE-powered devices such as VoIP phones, patient monitors, and nursing call systems offer greater reliability, improved patient care, and cost savings, leading to higher demand for PoE chipsets in this sector. Additionally, regulatory standards and guidelines encouraging the use of PoE technology for energy efficiency and safety are propelling market growth.

Power Over Ethernet (PoE) Chipsets Market Trends/Drivers:

Demand for Cost-Effective and Efficient Networking Solutions

PoE chipsets have become a preferred choice for businesses due to their cost-effectiveness and operational efficiency. They significantly reduce the costs associated with the deployment of separate networks for power and data transmission, as they allow the simultaneous transmission of power and data over a single ethernet cable. This minimizes the need for multiple cables and power supplies, as well as simplifies the installation process and reduces maintenance efforts. Furthermore, the flexibility offered by PoE chipsets to place devices anywhere without the need for a nearby power outlet enhances their appeal, thereby driving their adoption across various industry verticals.

Adoption of Smart Home Automation and IoT Devices

The rise of the smart home trend and the expanding IoT landscape have created a substantial demand for PoE chipsets. Smart home devices, ranging from security cameras to lighting systems, and IoT devices often require both power and network

connectivity. PoE technology effectively meets these requirements, allowing these devices to function optimally. The convenience of powering devices and providing a stable internet connection through one cable is particularly advantageous in home automation, where minimal cabling and aesthetic appeal are preferred. Thus, the rise in the adoption of smart home automation and IoT devices is a major driving force for the market.

Use of IP Telephony and IP Cameras

The increasing implementation of IP telephony and IP cameras in commercial sectors is another significant factor propelling the growth of the PoE chipset market. IP telephony, due to its cost-effectiveness and superior functionality, has become a preferred choice for many businesses, and these systems often rely on PoE for power. Similarly, the widespread use of IP cameras for security and surveillance purposes has led to an upsurge in demand for PoE chipsets. These chipsets simplify the installation of IP cameras by eliminating the need for separate power sources, thereby facilitating their deployment in a wide range of locations. As businesses continue to prioritize security and effective communication, the demand for PoE chipsets is expected to remain high.

Power Over Ethernet (PoE) Chipsets Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global power over ethernet (PoE) chipsets market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on type, standard, device type, application and end-use sector.

Breakup by Type:

Power Sourcing Equipment (PSE) Chipset

Powered Devices (PD) Chipset

Powered devices (PD) chipset represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the type. This includes power sourcing equipment (PSE) chipset and powered devices (PD) chipset. According to the report, PD chipset represented the largest segment.

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The broad range of devices that can be classified as PDs, including IP cameras, VoIP phones, wireless access points, lighting fixtures, and numerous IoT devices, is significantly contributing to the market growth in this segment. Furthermore, the shift towards digitalization and smart infrastructure across numerous industries has increased the need for such devices. The deployment of smart devices, especially in IoT applications and smart buildings, is rising, which, in turn, is driving the demand for PD chipsets. Additionally, the simplicity and flexibility offered by PoE technology, allowing PDs to be installed at any location without the necessity for a separate power source, have made it a preferred choice.

Breakup by Standard:

802.3af Standard

802.3at Standard

802.3bt Standard

802.3bt standard accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the standard. This includes 802.3af standard, 802.3at standard, and 802.3bt standard. According to the report, 802.3bt standard represented the largest segment.

The demand for 802.3bt standard, also known as PoE++, is being driven by its enhanced capabilities and broader range of applications. It significantly increases the maximum power that can be delivered to devices over ethernet cables, up to 60W and even 90W in some cases. This increase in power capability allows for the operation of a wider array of devices, including PTZ cameras, LED lighting, digital signage, and even laptops. Furthermore, the 802.3bt standard includes features like Autoclass, which allows a powered device to communicate its specific power needs to the power sourcing equipment, ensuring optimal power allocation and increased overall efficiency. The versatility, high power capabilities, and efficiency provided by the 802.3bt standard have resulted in its wide acceptance and adoption across various sectors.

Breakup by Device Type:

Network Cameras

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VoIP Phone

Ethernet Switch and Injector

Wireless Radio Access Point

Proximity Sensor

Others

VoIP phone holds the largest market share

The report has provided a detailed breakup and analysis of the market based on the device type. This includes network cameras, VoIP phone, ethernet switch and injector, wireless radio access point, proximity sensor, and others. According to the report, VoIP phone represented the largest segment.

VoIP phones offer numerous advantages over traditional phone systems, including cost-effectiveness, advanced features, and improved call quality. As a result, the demand for VoIP phones, and consequently for PoE chipsets that power these devices, has grown considerably. Moreover, PoE technology has significantly simplified the installation and operation of VoIP phones. With PoE, VoIP phones can receive both power and data over a single Ethernet cable, thereby eliminating the need for separate power adapters or electrical outlets near each phone. This allows for a more flexible and easier installation, especially in large office spaces or call centers.

Breakup by Application:

Connectivity

Infotainment

LED Lighting

Security

Others

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LED lighting enjoys the leading position in the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes connectivity, infotainment, LED lighting, security, and others. According to the report, LED lighting represented the largest segment.

LED lights powered by PoE are highly energy-efficient, which is driving their adoption across various sectors. In addition to this, PoE enables easier installation and management of LED lighting systems. PoE eliminates the need for separate electrical wiring, thereby reducing installation complexity and costs. Also, it allows for centralized control of the lighting system, enabling the users to monitor, adjust, and manage the lights from a single point. Besides this, the rise of smart buildings and cities is significantly contributing to the growth of this segment. In smart buildings, PoE-powered LED lights can be integrated into the building's network, allowing for advanced functionalities like automated control based on occupancy or daylight availability, thereby enhancing energy efficiency.

Breakup by End-Use Sector:

Residential

Commercial

Industrial

The report has provided a detailed breakup and analysis of the market based on the end use sector. This includes residential, commercial, and industrial.

In the residential sector, PoE chipsets are commonly used in smart home applications, powering devices such as smart cameras, IoT devices, Wi-Fi extenders, and LED lighting systems. With the increasing adoption of smart home automation, the residential segment is expected to show substantial growth in the future.

The commercial sector, which includes office spaces, retail, healthcare, and hospitality, among others, represents a significant share of the market. PoE chipsets are widely used to power VoIP phones, IP cameras, wireless access points, and other networked

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devices in these environments. The adoption of PoE in this sector is driven by the need for cost-effective, reliable, and easy-to-install power solutions.

The industrial sector also makes substantial use of PoE chipsets, especially in situations that require reliable power delivery in harsh or challenging environments. Some of the applications include powering industrial automation equipment, security cameras, and access control systems.

Breakup by Region:

- North America
- United States
- Canada
- Asia Pacific
- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Others
- Europe
- Germany
- France
- United Kingdom

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Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest power over ethernet (PoE) chipsets market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

North America holds the largest market share in the market, primarily due to the well-established infrastructure in the region, coupled with the rapid adoption of advanced technologies. In addition, the healthcare industry in the region is witnessing a shift toward PoE technology for devices like patient monitors and VoIP phones, which, in turn, is further augmenting the market. Moreover, the rising smart home automation and IoT implementation has significantly boosted the utilization of PoE for easy installation and management of smart devices. Additionally, the presence of stringent regulatory standards encouraging energy efficiency is further promoting the use of PoE.

Competitive Landscape:

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The key players in the market are focusing on various strategies to enhance their market position and meet the evolving needs of their customers. Leading vendors are investing heavily in R&D to introduce innovative PoE chipsets that can deliver higher power levels and cater to a wider range of devices. They are also working to improve the energy efficiency of their products to meet the growing demand for sustainable solutions. In addition to this, players in the market are actively engaging in mergers and acquisitions to strengthen their product portfolio, expand their geographic reach, and gain a competitive edge in the market. Many firms are also entering into strategic partnerships and collaborations to combine their expertise and resources.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Analog Devices Inc.

Cisco Systems Inc.

Delta Controls Inc.

Kinetic Technologies

Maxim Integrated

Microsemi Corporation (Microchip Technology Inc.)

Monolithic Power Systems Inc.

NXP Semiconductors N.V.

On Semiconductor Corporation

Semtech Corporation

Silicon Laboratories Inc.

STMicroelectronics N.V.

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Texas Instruments Incorporated

Recent Developments:

In November 2022, Analog Devices introduces Single-pair Power over Ethernet (SPoE) solutions to enable greater levels of intelligence in smart buildings and factory automation at the edge of traditional networks.

Kinetic Technologies has launched the industry’s smallest 13W PoE solutions to new products compliant with the higher power IEEE802.3bt standard at the Consumer Electronic Show (CES) 2023.

In July 2023, Microchip Technology has announced that it will invest $300 million in expanding its operations in India to tap into the country's growing semiconductor industry. The investments will focus on improving facilities, expanding engineering labs, hiring talent, and supporting technical consortia and academic institutions.

Key Questions Answered in This Report:

How has the global power over ethernet (PoE) chipsets market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global power over ethernet (PoE) chipsets market?

What is the impact of each driver, restraint, and opportunity on the global power over ethernet (PoE) chipsets market?

What are the key regional markets?

Which countries represent the most attractive power over ethernet (PoE) chipsets market?

What is the breakup of the market based on the type?

Which is the most attractive type in the power over ethernet (PoE) chipsets

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market?

What is the breakup of the market based on the standard?

Which is the most attractive standard in the power over ethernet (PoE) chipsets market?

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