

Global Automotive Ethernet PHY IC Market Growth 2026-2032

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Abstracts

The global Automotive Ethernet PHY IC market size is predicted to grow from US\$ 1516 million in 2025 to US\$ 3824 million in 2032; it is expected to grow at a CAGR of 13.3% from 2026 to 2032.

An Automotive Ethernet PHY IC (Physical Layer Integrated Circuit) is a key component in in-vehicle Ethernet communication systems. It handles the conversion between digital data from the data link layer and electrical signals suitable for transmission over physical media such as twisted pair or coaxial cables. At the receiving end, it converts the signals back into digital form. It is widely used in automotive applications such as ADAS, infotainment systems, domain controllers, and autonomous driving networks, enabling high-speed, low-latency, and reliable in-vehicle communication. In 2025, global Automotive Ethernet PHY IC production reached approximately 203 M units, with an average global market price of around US\$ 2.10 per unit. Annual production capacity is 240 M Units. Gross Profit Margin?65%. The automotive Ethernet PHY IC industry chain is structured across four main layers: upstream semiconductor materials and wafer fabrication, midstream chip design and manufacturing, downstream module integration by Tier 1 suppliers, and final deployment in OEM vehicle platforms. Upstream, silicon wafers, photomasks, and specialty analog process technologies (28nm?180nm mixed-signal nodes) form the foundation. Midstream is dominated by fabless design houses and IDM companies such as NXP, Broadcom, Marvell, and TI, which design PHY architectures and outsource or partially integrate manufacturing. Downstream Tier 1 suppliers integrate PHYs into ECUs, domain controllers, ADAS modules, and zonal architecture systems, which are then embedded into OEM vehicle electrical/electronic platforms. Automotive Ethernet PHY ICs are transitioning from a niche connectivity component into a core enabler of centralized vehicle computing architectures. Demand growth is driven less by price and more by increasing PHY count per vehicle as EVs

and software-defined vehicles adopt zonal and gigabit Ethernet backbones. However, the market is structurally constrained by high technological barriers, long qualification cycles, and strong concentration among a few global suppliers. In the long term, value will shift from standalone PHY chips toward integrated networking solutions combining PHY, switch, and compute functions.

United States market for Automotive Ethernet PHY IC is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Automotive Ethernet PHY IC is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Automotive Ethernet PHY IC is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Automotive Ethernet PHY IC players cover Infineon Technologies AG, Nxp Semiconductors N.V., MaxLinear, Texas Instruments Incorporated, Renesas Electronics Corporation, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LP Information, Inc. (LPI) ' newest research report, the "Automotive Ethernet PHY IC Industry Forecast" looks at past sales and reviews total world Automotive Ethernet PHY IC sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive Ethernet PHY IC sales for 2026 through 2032. With Automotive Ethernet PHY IC sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Automotive Ethernet PHY IC industry.

This Insight Report provides a comprehensive analysis of the global Automotive Ethernet PHY IC landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive Ethernet PHY IC portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive Ethernet PHY IC market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive Ethernet PHY IC and breaks down the forecast by Data Rate / Speed, by Application, geography, and market size to highlight

emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive Ethernet PHY IC.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive Ethernet PHY IC market by product type, application, key manufacturers and key regions and countries.

Segmentation by Data Rate / Speed:

100BASE-T1 PHY

1000BASE-T1 PHY

2.5GBASE-T1 PHY

10GBASE-T1 PHY

Segmentation by Port Architecture:

Single-Port PHY

Multi-Port PHY

Segmentation by Integration Level:

Stand-alone PHY IC

PHY + Ethernet Switch

PHY with MAC/Controller Integration

Segmentation by Application:

OEM

Tier 1 Suppliers

Aftermarket

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Infineon Technologies AG

Nxp Semiconductors N.V.

MaxLinear

Texas Instruments Incorporated

Renesas Electronics Corporation

Broadcom Inc

Marvell Technology

Qualcomm Incorporated

Realtek Semiconductor Corporation

Microchip Technology Incorporate

Novosense Microelectronics

Innosilicon

GigaDevice

VeriSilicon

Nationz Technologies

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive Ethernet PHY IC market?

What factors are driving Automotive Ethernet PHY IC market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive Ethernet PHY IC market opportunities vary by end market size?

How does Automotive Ethernet PHY IC break out by Data Rate / Speed, by Application?

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