

Power Over Ethernet (PoE) Solutions Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Power sourcing equipment controller & ICs, Power Devices controller & ICs), By Device Type (Ethernet Switches and Injectors, IP Cameras, VoIP Phones, Wireless Radio Access Points, Others), By Application (IoT Connectivity, Lighting Control, Infotainment, Access Control and Security, Others), By End User (Commercial, Residential, Industrial), By Region, By Competition, 2018-2028

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Abstracts

Global Power over Ethernet (PoE) Solutions Market was valued at USD 2.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 10.19% through 2028.

The global Power over Ethernet (PoE) Solutions market refers to a dynamic and rapidly expanding sector within the broader technology and networking industry. PoE technology enables the simultaneous transmission of data and electrical power over standard Ethernet cables, eliminating the need for separate power sources for connected devices. This innovative approach simplifies infrastructure, reduces installation costs, and enhances energy efficiency.

The PoE Solutions market encompasses a wide range of products and services, including PoE switches, injectors, splitters, and powered devices (PDs) such as IP

cameras, wireless access points, and VoIP phones. These solutions find applications across diverse sectors, including IT and telecommunications, healthcare, smart buildings, industrial automation, and more.

Key drivers of this market include the growing demand for energy-efficient solutions, the proliferation of Internet of Things (IoT) devices, advancements in PoE standards, the rise of smart buildings and cities, and the expansion of remote working. Government policies, industry standards, and technological innovations also play pivotal roles in shaping the PoE Solutions market's growth trajectory. As organizations worldwide seek to enhance operational efficiency, reduce energy consumption, and simplify network infrastructure, the PoE Solutions market continues to evolve, offering innovative solutions to meet the evolving needs of the modern interconnected world.

Key Market Drivers

Proliferation of IoT Devices

The proliferation of Internet of Things (IoT) devices across various industries has become a significant driver of the global Power over Ethernet (PoE) solutions market. IoT devices, ranging from surveillance cameras and access points to smart sensors, often rely on PoE technology for both data connectivity and power supply. PoE simplifies the deployment of these devices by eliminating the need for separate power cables and outlets. This not only reduces installation costs but also enhances flexibility, making it easier to position IoT devices in locations that may lack convenient access to electrical outlets.

As the IoT ecosystem continues to expand, the demand for PoE solutions is on the rise. IoT applications are becoming increasingly prevalent in sectors like manufacturing, healthcare, and smart cities, all of which rely heavily on PoE to power and connect their devices. This trend is expected to persist, driving sustained growth in the PoE market.

Energy Efficiency and Cost Savings

Energy efficiency and cost savings have become paramount concerns for businesses and organizations worldwide. PoE technology aligns with these concerns by reducing power consumption and promoting sustainability. By transmitting both data and power over a single Ethernet cable, PoE eliminates the need for additional power cords and reduces energy wastage. This not only simplifies infrastructure but also lowers energy bills, making PoE an attractive option for cost-conscious enterprises.

The green technology movement has further bolstered PoE adoption, particularly in sectors like smart buildings and LED lighting. PoE lighting solutions, for example, are known for their energy efficiency, controllability, and long-term cost savings. As more businesses prioritize sustainability and energy conservation, PoE's energy-efficient features will continue to drive its market growth.

Advancements in PoE Standards

Advancements in PoE standards have played a pivotal role in expanding the market. With each new standard, PoE becomes more versatile and capable of delivering higher power levels. Standards like IEEE 802.3af (PoE), IEEE 802.3at (PoE+), and IEEE 802.3bt (PoE++) have extended the range of PoE applications, making it suitable for a wide array of devices and industries.

The introduction of higher power levels, in particular, has opened doors to new possibilities. PoE++ allows for the powering of high-demand devices such as pan-tilt-zoom (PTZ) cameras, 4K displays, and advanced access points. These advancements make PoE an increasingly attractive solution across diverse sectors, from industrial automation to retail, contributing to its market expansion.

Growing Demand for Smart Buildings

The concept of smart buildings, equipped with intelligent systems for energy management, security, and automation, has gained substantial momentum globally. PoE is an essential enabler of smart building solutions as it powers devices like lighting controls, IP cameras, and occupancy sensors. PoE's ability to consolidate power and data transmission over a single cable simplifies installation, reduces maintenance costs, and enhances overall efficiency.

As businesses and organizations seek to create more sustainable and connected environments, the demand for PoE solutions in the smart building sector is expected to grow. PoE-driven smart lighting, in particular, offers significant energy savings and controllability, making it a key driver for market expansion.

Rise in Remote Working and Telecommuting

The rise of remote working and telecommuting, accelerated by global events like the COVID-19 pandemic, has necessitated robust and flexible network infrastructures. PoE

plays a vital role in supporting remote work by powering devices such as IP phones, Wi-Fi access points, and video conferencing equipment.

To adapt to the new normal of remote work, organizations are investing in PoE solutions that ensure reliable connectivity and power supply for remote employees. The demand for PoE-powered devices and infrastructure to support remote work is expected to persist even as traditional office settings evolve, contributing to market growth.

Increased Adoption in Healthcare

The healthcare sector has recognized the benefits of PoE in enhancing patient care and operational efficiency. PoE technology is widely used to power critical devices in healthcare facilities, including nurse call systems, medical imaging equipment, and monitoring devices. PoE ensures uninterrupted power supply to these devices, reducing the risk of critical failures and improving patient safety. Additionally, PoE simplifies infrastructure by consolidating power and data transmission, resulting in lower installation and maintenance costs—a significant factor for budget-conscious healthcare institutions. As the healthcare industry continues its digital transformation, the adoption of PoE solutions is expected to increase, driving market growth. The reliance on PoE in healthcare extends to telemedicine and remote patient monitoring, making it a vital technology for modern healthcare delivery.

In conclusion, the global Power over Ethernet (PoE) solutions market is driven by the proliferation of IoT devices, energy efficiency, advancements in PoE standards, smart building initiatives, remote working trends, and increased adoption in healthcare. These drivers collectively contribute to the market's expansion and underscore the versatility and relevance of PoE technology in a wide range of industries.

Government Policies are Likely to Propel the Market

Energy Efficiency Standards and Incentives

Government policies aimed at promoting energy efficiency play a crucial role in shaping the PoE solutions market. Many governments worldwide have implemented stringent energy efficiency standards and regulations to reduce energy consumption and combat climate change. These policies often incentivize businesses and industries to adopt energy-efficient technologies like PoE.

For instance, governments may offer tax incentives, grants, or rebates to organizations

that invest in PoE solutions to reduce their energy usage. By aligning with energy efficiency goals, PoE technology helps organizations comply with these policies while also reducing their operational costs. Such government initiatives encourage the adoption of PoE solutions across various sectors, from smart buildings to industrial automation, contributing to market growth.

Cybersecurity and Data Privacy Regulations

As PoE solutions play a pivotal role in powering and connecting critical devices, government policies related to cybersecurity and data privacy are increasingly important. Governments worldwide have implemented strict regulations to protect sensitive data and prevent cyber threats. These policies mandate organizations to secure their network infrastructure, including PoE-powered devices, to safeguard against potential breaches.

Government policies may require organizations to adhere to specific cybersecurity standards or invest in secure PoE equipment. Compliance with these regulations not only enhances data security but also bolsters trust among customers and partners. Failure to comply with these policies can result in hefty fines and legal consequences, compelling organizations to prioritize cybersecurity in their PoE deployments.

Telecommunications and Spectrum Allocation

Government policies related to telecommunications and spectrum allocation can significantly impact the PoE solutions market, especially in the context of PoE-powered wireless communication devices. Governments regulate the allocation of radio frequencies and wireless spectrum to ensure efficient and interference-free wireless communication.

To enable the growth of PoE-powered wireless devices like Wi-Fi access points and cellular infrastructure, governments must allocate sufficient spectrum resources and establish policies that promote the deployment of such devices. Additionally, policies related to spectrum licensing and usage fees can influence the cost and feasibility of PoE-powered wireless solutions.

Government support for the expansion of wireless connectivity through PoE can drive innovation in telecommunications and foster the development of smart cities and IoT applications, positively impacting the PoE solutions market.

Import and Export Regulations

Government policies regarding the import and export of PoE equipment can have a direct impact on the global PoE solutions market. These policies may include import tariffs, export controls, and product certification requirements. Import tariffs can affect the cost competitiveness of PoE solutions in different regions. High tariffs can lead to increased prices for PoE equipment, potentially limiting adoption in certain markets. Conversely, governments may provide incentives to manufacturers to export PoE solutions, stimulating international trade and market growth.

Product certification requirements, such as safety and compliance certifications, can also influence the market. Governments may mandate that PoE equipment meets specific standards before entering their markets, ensuring the safety and reliability of PoE deployments.

Infrastructure Development and Smart City Initiatives

Government policies aimed at infrastructure development and smart city initiatives can drive the adoption of PoE solutions. Many governments are investing in smart city projects that leverage PoE technology to enhance urban infrastructure, including intelligent street lighting, traffic management, and environmental monitoring. Through funding, incentives, and regulatory support, governments can accelerate the implementation of PoE-powered smart city solutions. These policies create a favourable environment for PoE solution providers and encourage innovation in urban infrastructure, positively impacting market growth.

Research and Development Funding

Government policies that allocate funding for research and development (R&D) in technology sectors can have a significant influence on the PoE solutions market. Governments may provide grants, subsidies, or tax incentives to organizations engaged in PoE-related R&D activities. These policies stimulate innovation, leading to the development of more advanced and efficient PoE solutions. R&D funding can support the creation of PoE standards, new PoE-enabled devices, and software solutions that enhance PoE network management and security.

In conclusion, government policies related to energy efficiency, cybersecurity, telecommunications, import/export regulations, infrastructure development, and R&D funding play essential roles in shaping the global Power over Ethernet (PoE) Solutions

market. These policies can either incentivize or create barriers to the adoption and growth of PoE technology, making them crucial considerations for businesses and organizations in the PoE industry.

Key Market Challenges

Interoperability and Compatibility Issues

One of the foremost challenges in the global Power over Ethernet (PoE) Solutions market is the issue of interoperability and compatibility. While PoE standards like IEEE 802.3af, IEEE 802.3at (PoE+), and IEEE 802.3bt (PoE++) have been established to ensure a level of uniformity, the market still faces complexities due to variations in vendor-specific implementations and evolving standards. PoE devices and equipment from different manufacturers may not always work seamlessly together. This can result in integration difficulties, network instability, and reduced overall efficiency. For instance, a PoE switch from one vendor may not provide adequate power to a PoE-powered device from another vendor, leading to underperformance or incompatibility.

The challenge of interoperability is further exacerbated as PoE standards continue to evolve to accommodate higher power requirements for new devices and applications. This evolution means that older PoE devices may not be compatible with newer PoE switches, necessitating costly upgrades or replacements. To address this challenge, industry stakeholders, standards organizations, and governments need to collaborate to establish clear guidelines and certification processes for PoE interoperability. Additionally, vendors should invest in robust testing and validation procedures to ensure that their PoE equipment works seamlessly with products from other manufacturers. End-users should also carefully consider interoperability issues when planning their PoE deployments to avoid costly integration problems.

Power Delivery Limitations and Distance Constraints

Another significant challenge facing the global PoE Solutions market is the limitation of power delivery and distance constraints. PoE standards specify the maximum power that can be delivered over Ethernet cables, typically measured in watts. While these standards have evolved to support higher power levels, there are still inherent limitations.

For example, IEEE 802.3af (PoE) can deliver up to 15.4 watts of power per port, while IEEE 802.3at (PoE+) can provide up to 30 watts. Even the most recent standard, IEEE

802.3bt (PoE++), with its Type 4 designation, can deliver up to 100 watts of power. While this is sufficient for many devices, some power-hungry applications, such as high-performance access points, PTZ cameras, and industrial equipment, may require more power than these standards can provide.

Additionally, PoE's power delivery capability diminishes as cable length increases. Ethernet cables have a practical distance limitation, beyond which power levels drop, and the device may not receive sufficient power to function correctly. This limitation can be a challenge for installations that require devices to be located far from the PoE switch or power source. To overcome this challenge, organizations often resort to deploying additional PoE switches or using extenders, but these solutions can be costly and complex to manage. Addressing this challenge requires ongoing research and development efforts to improve power delivery efficiency, explore alternative power delivery methods, and develop PoE standards that can support higher power levels over longer distances. Furthermore, it necessitates careful planning and design of PoE infrastructure to ensure devices receive adequate power within the specified distance constraints.

In conclusion, the global Power over Ethernet (PoE) Solutions market faces challenges related to interoperability and compatibility, as well as power delivery limitations and distance constraints. Addressing these challenges requires collaborative efforts from industry stakeholders, standards organizations, and governments to establish clear guidelines, improve interoperability, and develop innovative solutions that can meet the evolving demands of PoE technology in various applications.

Segmental Insights

Power sourcing equipment controller & ICs Insights

The Power sourcing equipment controller & ICs segment had the largest market share in 2022 & expected to maintain it in the forecast period. PSE controllers and ICs are an integral part of network switches, routers, and midspans, which are the backbone of network infrastructure in various industries. These devices act as the power source, delivering both data and electrical power to PoE-enabled devices like IP cameras, wireless access points, and VoIP phones. Because nearly all network installations require switches and routers, the demand for PSE controllers is consistently high. PoE standards, such as IEEE 802.3af, IEEE 802.3at (PoE+), and IEEE 802.3bt (PoE++), provide a standardized framework for PSE controllers. This standardization ensures compatibility and interoperability across different vendors and devices. As a result, PSE

controllers are a reliable choice for network administrators and engineers seeking to implement PoE without concerns about compatibility issues. PSE controllers are primarily used in enterprise and commercial environments where network reliability, scalability, and manageability are critical. These applications include offices, data centers, education institutions, healthcare facilities, and telecommunications infrastructure. The PoE technology provided by PSE controllers supports a wide range of devices that enhance productivity and security in these settings. PSE controllers offer advanced power management features, allowing network administrators to monitor and control power delivery to connected devices. This capability is valuable for optimizing power usage, troubleshooting network issues, and ensuring device uptime. It aligns with the requirements of businesses and organizations that prioritize efficient power management. The IT and telecommunications sectors have been early and consistent adopters of PoE technology, driving the widespread use of PSE controllers. The ability to power network devices, such as VoIP phones and wireless access points, over Ethernet cables has significantly simplified network deployments and reduced cabling complexity. PSE controllers provide scalability, allowing organizations to expand their PoE infrastructure as needed. This scalability supports the growing demand for PoE-powered devices, especially in the context of the Internet of Things (IoT), where sensors, cameras, and other endpoints rely on PoE. PSE controllers are designed to deliver reliable and consistent power to PoE devices, ensuring their proper operation. This reliability is crucial in applications where uninterrupted power supply is essential, such as surveillance systems and emergency communication devices.

IoT Connectivity Insights

The IoT Connectivity segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. The IoT ecosystem has witnessed explosive growth, with billions of connected devices worldwide. These devices, which include sensors, cameras, smart sensors, and more, require both data connectivity and power supply. PoE technology is uniquely positioned to meet these dual requirements by enabling the simultaneous transmission of data and power over a single Ethernet cable. PoE simplifies the deployment of IoT devices significantly. Traditional IoT deployments often require separate power cables and data connections, leading to complex and costly infrastructure. PoE eliminates this complexity, as devices can be powered and connected through a single Ethernet cable, reducing installation time and costs. Cost is a critical factor in IoT deployments. PoE's cost-efficiency is a driving factor in its dominance in IoT connectivity. Organizations can save on cabling, installation labor, and power infrastructure costs by leveraging PoE. This cost-effectiveness is particularly attractive for large-scale IoT deployments in industries like

manufacturing, agriculture, and smart cities. Energy efficiency is crucial for IoT devices that may operate 24/7. PoE technology has evolved to be energy-efficient, reducing power consumption and contributing to sustainability goals. This is especially important in applications like environmental monitoring, where IoT sensors need to operate continuously with minimal energy usage. IoT devices are often deployed in remote or challenging locations, where access to power outlets may be limited. PoE's ability to transmit power over Ethernet cables for distances up to 100 meters provides flexibility in device placement. This is beneficial for applications like outdoor surveillance cameras, where PoE eliminates the need for costly electrical work. IoT ecosystems are characterized by their scalability. As organizations expand their IoT networks to accommodate more devices, PoE infrastructure can easily scale to support additional endpoints. This scalability supports the growing demand for PoE-powered IoT devices. PoE infrastructure allows for centralized management of connected devices. Network administrators can remotely monitor and control power delivery to IoT devices, enabling efficient management and troubleshooting. This centralized approach is critical for large-scale IoT deployments across various industries. Reliability is paramount for IoT devices in critical applications, such as healthcare, industrial automation, and smart cities. PoE's reliable power delivery ensures that IoT devices receive a consistent power supply, reducing the risk of device failures and data loss.

Regional Insights

North America had the largest market for PoE solutions in 2022. The growth of the PoE solutions market in North America is attributed to the early adoption of new technologies, the presence of major key players, and the increasing demand for PoE-enabled devices in commercial and industrial settings.

Europe had the second-largest market for PoE solutions in 2022. The growth of the PoE solutions market in Europe is attributed to the increasing demand for PoE-enabled devices in smart city and building automation projects.

Asia Pacific is expected the fastest-growing market for PoE solutions, with a high CAGR during the upcoming years. The growth of the PoE solutions market in Asia Pacific is attributed to the rapid expansion of the IT and telecommunications sector in the region and the growing adoption of PoE-enabled devices in commercial and industrial settings.

Key Market Players

Cisco Systems Inc.

Ubiquiti Inc

Hewlett Packard Enterprise Company

NETGEAR Inc

Allied Telesisc Holding

Axis Communications

Microsemi Corporation

PoE Texas

PLANET Technology Corporation.

Report Scope:

In this report, the Global Power over Ethernet (PoE) Solutions Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Power over Ethernet (PoE) Solutions Market, By Type:

Power sourcing equipment controller & ICs

Power Devices controller & ICs

Power over Ethernet (PoE) Solutions Market, By Device Type:

Ethernet Switches and Injectors

IP Cameras

VoIP Phones

Wireless Radio Access Points

Others

Power over Ethernet (PoE) Solutions Market, By End User:

Commercial

Residential

Industrial

Power over Ethernet (PoE) Solutions Market, By Application:

IoT Connectivity

Lighting Control

Infotainment

Access Control and Security

Others

Power over Ethernet (PoE) Solutions Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Power over Ethernet (PoE) Solutions Market.

Available Customizations:

Global Power over Ethernet (PoE) Solutions market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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