

Power over Ethernet (PoE) Chipset Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented, By Application (LED Lighting, Security, Connectivity), By End-User (Commercial, Residential, Industrial), By Device (Network Cameras, VOIP Phone, Ethernet Switch & Injector), By Region, By Competition, 2020-2030F

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Report description:

Global Power over Ethernet (PoE) Chipset Market was valued at USD 1.28 billion in 2024 and is expected to reach USD 2.96 billion by 2030 with a CAGR of 14.85% during the forecast period. The Power over Ethernet (PoE) Chipset Market refers to the industry focused on the development, production, and deployment of chipsets that enable Power over Ethernet technology, a system allowing both power and data transmission over a single Ethernet cable. These chipsets are integral components of PoE solutions, facilitating the delivery of electrical power to devices such as IP cameras, wireless access points, VoIP phones, and other networked devices without the need for separate power supplies. The market encompasses a wide range of chipset types, including PoE controllers, drivers, and powered device (PD) interfaces, which are designed to support varying power levels, from standard PoE (up to 15.4W) to PoE+ (up to 30W) and PoE++ (up to 90W), enabling their use in diverse applications. The PoE chipset market is driven by the increasing adoption of smart devices, the expansion of IoT ecosystems, and the growing demand for simplified and cost-effective networking solutions in both commercial and industrial environments. Technological advancements, such as the development of more efficient and higher-capacity chipsets, further fuel market growth, as do initiatives to standardize PoE protocols, ensuring interoperability and scalability. The market also benefits from the rising need for seamless connectivity in smart buildings, cities, and enterprise networks, making it a critical component of modern network infrastructure.

Key Market Drivers

Rising Adoption of IoT Devices

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The growing adoption of Internet of Things (IoT) devices across various industries is a key driver for the Power over Ethernet (PoE) chipset market. IoT devices, ranging from smart lighting systems and security cameras to industrial sensors and connected healthcare equipment, require reliable power and data transmission over a single cable. PoE technology meets this demand by enabling both functions through Ethernet cabling, reducing infrastructure complexity and costs. Industries such as smart buildings, industrial automation, and healthcare are leveraging IoT devices to enhance operational efficiency and provide innovative services, which in turn boosts the demand for PoE solutions. For instance, smart lighting systems powered by PoE allow centralized control and monitoring, resulting in energy savings and improved facility management. Similarly, the rising deployment of IP-based surveillance cameras in smart cities and enterprises further propels the need for PoE chipsets, as they ensure uninterrupted power supply and data connectivity. The scalability and flexibility of PoE-enabled networks also make them an ideal choice for businesses aiming to expand IoT deployments without significant infrastructure overhauls. Furthermore, advancements in PoE standards, such as IEEE 802.3bt, which supports higher power levels, enable the operation of more power-intensive IoT devices, driving market growth. With IoT adoption expected to surge in the coming years, the PoE chipset market is poised for substantial expansion. By 2030, the global number of connected IoT devices is projected to reach 25.4 billion, up from approximately 13.8 billion in 2021.

Increasing Demand for Smart Building Solutions

The increasing demand for smart building solutions is another significant driver for the Power over Ethernet (PoE) chipset market. Smart buildings integrate advanced technologies such as automated lighting, HVAC systems, access control, and surveillance to enhance energy efficiency, security, and occupant comfort. PoE technology plays a critical role in powering and connecting these systems seamlessly, enabling centralized management and reducing energy consumption. For instance, PoE-powered lighting systems allow facility managers to control brightness, monitor energy usage, and implement schedules remotely, leading to optimized energy usage and cost savings. Similarly, PoE-enabled access control systems and IP cameras provide enhanced security while simplifying installation and maintenance. The growing emphasis on green building initiatives and sustainability further accelerates the adoption of smart building technologies. Governments and organizations worldwide are investing in energy-efficient infrastructure, creating significant opportunities for PoE solutions. Additionally, the integration of PoE with building management systems (BMS) allows real-time monitoring and data analytics, enabling predictive maintenance and improved decision-making. The ability to support a wide range of smart building applications, coupled with the cost-effectiveness and ease of deployment of PoE technology, makes PoE chipsets a critical component in the development of intelligent buildings, driving robust market growth. By 2026, it is projected that over 70% of new commercial buildings will be "smart" buildings, integrating advanced automation, IoT, and AI technologies.

Expansion of Enterprise Networks and Data Centers

The expansion of enterprise networks and data centers is a major driver for the Power over Ethernet (PoE) chipset market. As businesses increasingly adopt cloud computing, edge computing, and digital transformation strategies, the demand for robust and scalable networking infrastructure grows. PoE technology offers an efficient solution for powering network devices such as wireless access points, VoIP phones, and IP cameras, simplifying deployment and reducing operational costs. The rise of remote work and hybrid work environments has further accelerated the need for advanced networking solutions, driving the adoption of PoE-enabled devices. Additionally, data centers, which form the backbone of modern IT infrastructure, are incorporating PoE technology to optimize energy usage and enhance connectivity. The ability to power devices over Ethernet cables reduces the need for separate power supplies, improving space utilization and minimizing cable clutter. Innovations in PoE standards, such as support for higher power delivery up to 90 watts, enable the operation of more power-intensive devices, expanding the scope of applications in enterprise and data center environments. As organizations continue to invest in digital infrastructure to support growing data demands and connectivity needs, the PoE chipset market is expected to witness sustained growth, driven by its critical role in powering next-generation networks. By 2026, it is estimated that over 60% of global enterprise data will be stored in cloud data centers, as organizations increasingly move toward hybrid and multi-cloud environments.

Key Market Challenges

Compatibility and Interoperability Issues

One of the significant challenges in the Power over Ethernet (PoE) Chipset Market is ensuring compatibility and interoperability among a diverse range of devices and network standards. As PoE technology continues to evolve, manufacturers are developing

devices that conform to varying standards, such as IEEE 802.3af, 802.3at, and 802.3bt. While these standards aim to enhance power delivery and support a broader range of devices, they often result in compatibility issues when integrated into legacy networks or devices that adhere to older specifications. Many organizations, especially in small and medium-sized enterprises (SMEs), operate with outdated infrastructure, and upgrading to support newer PoE standards can be cost-prohibitive. Furthermore, variations in chipset designs across manufacturers can result in operational inefficiencies, such as mismatched power supply or data transmission rates, leading to suboptimal performance. Interoperability challenges become more pronounced in mixed environments where devices from multiple vendors must function seamlessly. This lack of standardization can delay adoption, as end-users may hesitate to invest in PoE technology due to concerns over compatibility and future-proofing their networks. To overcome this challenge, chipset manufacturers must collaborate to establish uniform standards and rigorous testing protocols to ensure seamless integration and compatibility across diverse ecosystems, thus fostering market confidence and adoption.

Heat Dissipation and Power Efficiency Constraints

Heat dissipation and power efficiency constraints represent another critical challenge in the PoE Chipset Market, particularly as the demand for higher power delivery capabilities increases. Modern PoE standards, such as IEEE 802.3bt, allow for power delivery of up to 90 watts, enabling the support of power-intensive devices like PTZ cameras, wireless access points, and digital signage. However, higher power levels lead to increased thermal output, which poses significant challenges for chipset design and system reliability. Efficient heat dissipation is crucial to maintaining the performance and longevity of PoE-enabled devices, yet achieving this within compact form factors remains a complex engineering challenge. Excessive heat can degrade chipset performance, reduce energy efficiency, and, in extreme cases, lead to hardware failure. Additionally, the need for advanced thermal management solutions, such as heatsinks or active cooling systems, increases manufacturing costs, making PoE chipsets less attractive for cost-sensitive markets. Power efficiency is also a growing concern as organizations prioritize sustainable and energy-efficient solutions to align with environmental goals. The inefficiencies in power delivery and energy losses during transmission can undermine the overall value proposition of PoE technology, especially in large-scale deployments. Addressing these constraints requires continuous innovation in chipset design, leveraging advanced materials, and employing energy-efficient technologies to enhance thermal management and optimize power utilization, thereby ensuring reliable performance and market growth.

Key Market Trends

Growing Adoption of IoT and Smart Building Technologies

The Power over Ethernet (PoE) chipset market is witnessing robust growth driven by the rising adoption of Internet of Things (IoT) devices and smart building technologies. PoE chipsets provide a seamless solution for powering and connecting IoT devices, eliminating the need for separate power and data cables. This trend is particularly prominent in smart building applications, where IoT-enabled devices such as smart lighting, HVAC systems, access controls, and surveillance cameras demand integrated power and data solutions. PoE chipsets enable these devices to communicate efficiently while reducing installation costs and simplifying infrastructure. The increasing demand for energy-efficient solutions is further propelling the adoption of PoE in smart buildings. For instance, PoE-enabled LED lighting systems offer centralized control and significant energy savings, making them an attractive option for modern infrastructures. Additionally, the growing focus on sustainability and green building certifications has accelerated the deployment of PoE solutions, as they support reduced carbon footprints. The integration of advanced PoE chipsets with higher power delivery capabilities, such as IEEE 802.3bt standards, ensures compatibility with power-intensive devices, driving market expansion. As the IoT ecosystem expands, the PoE chipset market is poised to experience sustained growth, driven by advancements in smart technologies.

Increasing Integration of PoE in Edge Computing and Data Centers

The integration of Power over Ethernet (PoE) technology in edge computing and data centers is an emerging trend driving the PoE chipset market. Edge computing, which brings data processing closer to the source, relies heavily on compact and efficient power solutions, making PoE an ideal choice. PoE chipsets simplify the deployment of edge devices, such as sensors, gateways, and small servers, by providing both power and data over a single Ethernet cable. This reduces installation complexity, lowers costs, and enhances scalability. In data centers, PoE is gaining traction for powering network devices, including switches, routers, and IP-based equipment, enabling centralized power management and improved energy efficiency. The rise of remote work and digital transformation initiatives has further fueled the demand for edge computing, creating a robust market for PoE chipsets.

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Additionally, the growing emphasis on smart data centers and sustainable operations aligns with the benefits of PoE technology, which supports energy-saving initiatives and reduces infrastructure footprints. Manufacturers are introducing advanced PoE chipsets with features like higher power output, enhanced reliability, and improved heat dissipation to cater to these applications. As edge computing and data center technologies continue to evolve, the PoE chipset market is set to witness significant opportunities for growth and innovation.

Segmental Insights

Application Insights

The LED Lighting segment held the largest Market share in 2024. The Power over Ethernet (PoE) chipset market is experiencing robust growth in the LED lighting segment, driven by the increasing demand for energy-efficient and cost-effective lighting solutions in both residential and commercial spaces. PoE technology enables the delivery of power and data through a single Ethernet cable, eliminating the need for separate power infrastructure, thereby reducing installation costs and complexity. This integration aligns seamlessly with the growing adoption of LED lighting, which is favored for its superior energy efficiency, long lifespan, and low operational costs compared to traditional lighting solutions. The transition toward smart buildings and smart cities further propels this market, as PoE-enabled LED lighting systems are a fundamental component of intelligent infrastructure. These systems facilitate centralized control, remote monitoring, and automation, enabling significant energy savings and enhanced user experiences. The increasing implementation of Internet of Things (IoT) technologies also drives demand, as PoE chipsets support seamless connectivity between LED fixtures and building management systems. Moreover, government initiatives promoting energy-efficient infrastructure and environmental sustainability are fueling market growth, particularly in regions like North America, Europe, and Asia Pacific. As organizations prioritize eco-friendly solutions and operational efficiency, PoE-enabled LED lighting, powered by advanced chipset technologies, is set to witness exponential adoption and expansion globally.

Regional Insights

North America region held the largest market share in 2024. The Power over Ethernet (PoE) Chipset Market in North America is experiencing robust growth, driven by several key factors that underscore its increasing adoption across diverse industries. The surge in demand for smart and connected devices is a primary driver, fueled by the rapid expansion of IoT applications in sectors such as healthcare, retail, manufacturing, and smart buildings. Businesses are increasingly deploying PoE-enabled devices, such as IP cameras, wireless access points, and VoIP phones, to enhance operational efficiency and connectivity. This is complemented by advancements in PoE technology, including the development of IEEE 802.3bt standards, which enable higher power delivery and expand the scope of applications to include high-power devices like digital signage and smart lighting. The proliferation of smart city initiatives across the region further bolsters the market, as municipalities adopt PoE technology to power intelligent traffic systems, surveillance networks, and public Wi-Fi. Additionally, the growing focus on sustainable and energy-efficient solutions aligns with PoE's ability to deliver both power and data over a single cable, reducing infrastructure costs and energy consumption. The presence of major market players and the rapid pace of technological innovation in North America also contribute to market expansion. Collectively, these factors position the region as a dynamic growth hub for the PoE chipset market.

Key Market Players

- Analog Devices, Inc.
- Cisco Systems Inc.
- Microchip Technology Inc.
- Monolithic Power Systems Inc.
- NXP Semiconductors N.V.
- On Semiconductor Corporation
- Semtech Corporation
- Silicon Laboratories Inc.
- STMicroelectronics N.V.
- Texas Instruments Incorporated

Report Scope:

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

□□ Power over Ethernet (PoE) Chipset Market, By Application:

- o LED Lighting
- o Security
- o Connectivity

□□ Power over Ethernet (PoE) Chipset Market, By End-User:

- o Commercial
- o Residential
- o Industrial

□□ Power over Ethernet (PoE) Chipset Market, By Device:

- o Network Cameras
- o VOIP Phone
- o Ethernet Switch & Injector

□□ Power over Ethernet (PoE) Chipset Market, By Region:

- o North America
 - United States
 - Canada
 - Mexico
- o Europe
 - France
 - United Kingdom
 - Italy
 - Germany
 - Spain
- o Asia-Pacific
 - China
 - India
 - Japan
 - Australia
 - South Korea
- o South America
 - Brazil
 - Argentina
 - Colombia
- o Middle East & Africa
 - South Africa
 - Saudi Arabia
 - UAE
 - Kuwait
 - Turkey

Competitive Landscape

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

Available Customizations:

Global Power over Ethernet (PoE) Chipset 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

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

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