

## Broad Market Potential

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- a) Broad sets of applicability.**
- b) Multiple vendors and numerous users.**

### **Broad Sets of Applications:**

- 100 Mbit/s Automotive Ethernet is a rapidly growing market, driven by two factors:
  - New bandwidth-consuming in-car applications (cameras, collision avoidance, infotainment, etc.)
  - Consolidation of legacy in-car networks into the new homogenous Electronic Architecture
- Other applications include
  - Transportation (e.g. trains, busses, airplane cabins, traffic control systems, etc.) and similar applications
  - Industrial automation solutions using Ethernet for factory and process automation including instrumentation control and measurements.
- The 1 Twisted Pair 100 Mbit/s interface will improve the favorable cost balance for in-vehicle applications operating over single twisted pair balanced cabling.

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### **Multiple vendors and numerous users:**

- At the Call for Interest, the presentation shown was supported by 145 individuals (71 affiliated with automotive, 13 affiliated with industrial automation, 37 affiliated with semiconductor industry)
  - In 2014 approximately 95 million cars and light trucks will be produced
  - 13 million premium segment cars and 50 million middle segment cars
  - The prediction for 2019 is 115 million total with 15 million premium and 60 million middle segment.
- Data presented at CFI indicate hundreds of millions ports/year for single twisted pair Ethernet (with significant share for 100 Mb/s) in automotive by 2018-22.
- The Industrial Automation solutions currently have about 100 million installed Ethernet nodes on the market, with a growth of about 43% per year. A transition from fieldbus communication networks to Ethernet is on the way and new applications in industrial automation are expected.