



Analog, Mixed-Signal, RF and Custom Market Trends 2014

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EXECUTIVE SUMMARY

2013 was a slow year for **ESL**. It has been the methodology of the future since 1996 and saw the first large-scale adoption in 2011 along with the realization that the commercial tool flow was not complete. A completed flow then followed in 2013. This was followed by a slow take-off. Let's see what 2014 will look like.

That was good news for **RTL** as in general its growth was strong. Although you need to be careful as some of the RTL sub-apps will experience the slow growth we have been expecting for this methodology.

IC CAD continues to grow well as we are entering the era of new silicon technology. With the introduction of FinFETs we may be entering a node by node major technology introduction. If true, that means the EDA vendors just had its innovation cycle cut in half.

PCB design, the methodology of the past, has become the entry point to the wonderful new world of System Design Automation (SDA). PCB itself is being teamed-up with MCM design; 2D, 2 & ½D design, and 3D design; MEMS Design and Mechanical Design. This is giving Mentor and Cadence a door to the future.

A New Focus

Now that we are entering the world of System Level Design we need to look at the market, and therefore the numbers, in a different way. Systems Design methodology, and business requirements, are developed in the vertical, industry markets. There is no one systems market. This presentation of the basic Market Trends numbers in a different way is called second-cut reports. They are usually done as an on-demand report but some have been repeated on a more regular basis. The Analog Market Trends report is the prime example of a second-cut report. Our next attempt will be a System Level report. As we get further into this design methodology we may extend the report into multiple Industry reports, depending on demand.

INTRODUCTION

This report contains the market share data, forecasts and in-depth analysis and competitive trends for the Analog, Mixed-Signal, Custom and RF (Plus ESL RF) sections of the EDA market in 2013.

OVERVIEW

Worldwide semiconductor revenue reached \$335.8 billion in 2014, an increase of 9.9 percent over 2013 revenues of \$305.6 billion. According to the leading semiconductor vendors in the analog, mixed-signal and RF space, demand and investment was strong across a wide range of applications, especially in new Industrial, Automotive and Communication end markets. As stated by Chi-Ping Hsu, Senior V.P. and Chief Strategy Officer of EDA for Cadence, 2015 will be a watershed year for changes in design in EDA tools and flow, system application markets, and semiconductor device/SOC design.

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