



Analog, RF and Custom Market Trends 2009

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EXECUTIVE SUMMARY

It would be nice if we could present these numbers as being completely correct, but we can't. We are still suffering from the Cadence bookings machinations of the past. This time the numbers reflect a more negative view of Cadence that actually exists. The problem is by how much. We believe that there is only a 15% to 20% downside left in Cadence's revenue figures. That probably will be taken care of this year but may run into 2010. What is compounding the problem is that the Upper Mainstream Users, Cadence's main customer base, is continuing to drop out of the Implementation market. That mainly shows up in the IC CAD and RTL Synthesis numbers. We just don't know by how much.

Still these are by far the best look at the market we've had since 2004; before the bookings game started. What we are seeing is the flattening of the RTL market while the ESL market grows as it becomes the design methodology of choice. IC CAD continues to grow even as we are losing seats, because of the merciless march of Moore's Law. There may be fewer IC CAD engineers but the ones that we have are being swamped by problems that only RET (Resolution Enhancement Tools) and DFY (Design for Yield) tools can resolve. That will bring more dollars into the EDA vendor's bottom line. So welcome to the future; 2008 was the first year of the new era of EDA.

INTRODUCTION

The dramatic downturn that began in the back half of 2008 and continued through the first half of 2009 had significant impact on both EDA tool suppliers and users in the analog, RF and custom markets. From the EDA user side, specifically the semiconductor suppliers of these (Analog/MS, RF and Custom) products, the market deteriorated almost to the record level of 2001 when the analog/mixed-signal and custom market declined over 33 percent. Areas of increased booking activity include printers, PCs, servers, network equipment, smart-phones and handsets. Lead times are stretching in selected product areas but prices are still low suggesting it will take a few quarters of increased demand and inventory build before revenue growth returns to stronger double digit growth in 2010.

OVERVIEW

The Analog, RF and Custom Market Trends 2009 report includes market share, market forecast and analysis by sub-applications for the Analog, RF and Custom Market Trends 2009.

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