Analog, RF and Custom Market Trends 2009

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EXECUTIVE SUMMARY

The year 2009 was a tough one. The only thing keeping EDA from exceeding the negative 11.3% of 2008 was that Cadence had taken its worst financial cuts in 2008 and was in the second year of its negative bubble. At that the year came in at a negative 6.6%. The other major EDA vendors fared worse in 2009 than they did in 2008. 2010 is the last year of the Cadence negative bubble so their impact on the 2010 numbers should be small. We are presently forecasting close to 10% growth for 2010.

The general trends haven't changed. The move to ESL design is accelerating and the commoditization of the RTL tools, with the accompanying price pressures, is continuing. The shift of IC Layout seats to semiconductor vendors, whether they be foundries, IDMs or third party suppliers is also continuing. However the tooling required to contend with DFM effects is keeping the IC CAD market growing.

PCB, on the other hand, is reaching out to adjacent markets to drive its growth. That highlights a growing trend for EDA vendors getting into new markets, at least new to EDA. Synopsys' buy of an optical design tool vendor and the IC CAD vendors' entry into the solar cell design market are two examples. We are in a period of change and change is good. EDA will look a lot different, than it does now, by the year 2015.

INTRODUCTION

The last three years have been a roller-coaster ride for the electronics industry participants. The overall EDA market declined 7 percent in 2009 from 2008. This dramatic downturn that began in the back half of 2008 and continued through 2009 had significant impact on the top twenty worldwide EDA software suppliers as shown in Table A-1, as well as the user industry that depends on the EDA software tools and services.

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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