GARYSMITH EDA
CONSULTING IN ELECTRONIC DESIGN

IC CAD Market Trends 2013
Steady Course Ahead

www.garysmithEDA.com

LAURIE BALCH
laurie@garysmithEDA.com

SHARON TAN
sharon@garysmithEDA.com

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EXECUTIVE SUMMARY

MARKET SHARE

Synopsys continues to be uncertain about their future direction. In the meantime Cadence has put together an ESL flow that when paired with Atrenta's Silicon Virtual Prototype completes the ESL Flow. Mentor's strong position in the Embedded Tools market keeps them in the running. All they need to do is take a position in the Software Virtual Prototype market and they will be in good shape. With Synopsys' weaker position in the Emulation market, Cadence and Mentor would then be able to dominate the ESL flow.

MARKET GROWTH

With the late entry of the ESL flow this year there was no time to see the expected ESL hockey stick in 2012. As the Upper Mainstream users moved up from RTL to ESL they still did not find a complete commercial ESL flow available.

INTRODUCTION

The development of the Multi-Platform based design flow is beginning to cause a disruption in the classical ASIC design flow. As the design teams are completing their various platforms, using the classical ASIC design flow, they are handed off to the Multi-Platform Assembly team. Although this style of design keeps the number of blocks down to a manageable number it still presents an extremely large gate-count challenge. Because of this the Assembly team is adopting newer tools more adapted to designs rapidly closing in on a billion gates. This is leaving openings for the startups offering the new high gate-count tools.

The IC CAD market grew nearly 9 percent in 2012, somewhat below the overall EDA market growth rate of 11 percent in 2012 and quite a bit below the IC CAD market growth of 13 percent growth in 2011. The effect of all of the acquisitions and mergers in 2011 undoubtedly caused a slow down in growth in IC CAD in 2012, as companies absorbed the new products and customer bases.

OVERVIEW

The IC CAD Market Trends report includes market share, market forecast and analysis by subapplications for the IC CAD sub-applications.

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