

PCB Market Trends 2013

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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.

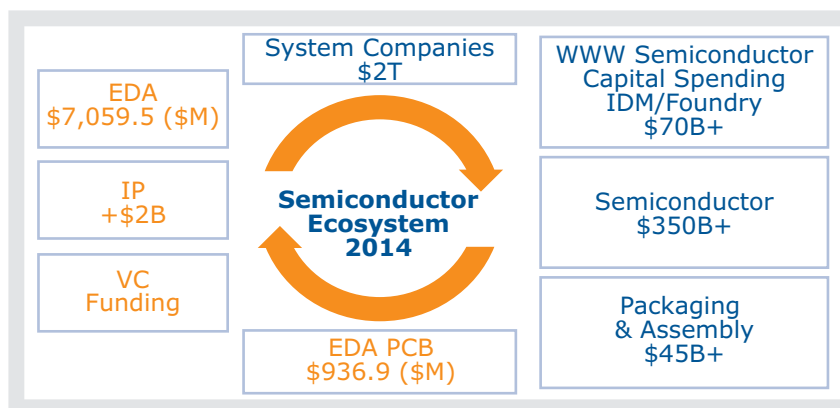
MARKET GROWTH

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

Riding a wave of expected strong demand for Internet-of-Things (IoT) devices during the next three to five years, global Venture Capitalists (VCs) have been investing small fortunes into internet, mobile and network/communications systems, foundry and EDA companies. Amid growing numbers of competitors from Asia, investment opportunities abound not only in the U.S. software and EDA start-up markets, but also across the entire Design Infrastructure. (See Table P-1)

Table P-1: Semiconductor Infrastructure 2014



(Source: Gary Smith EDA, November 2013)

OVERVIEW

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

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