



RTL Market Trends 2013 **Opportunities in the RTL Market**

www.garysmithEDA.com

RTL Market Trends 2013 Opportunities in the RTL Market

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 "RTL and Below" market turned in another year of good growth, growing over 10 percent in 2012 to reach \$2,260 million. This follows the previous year's 9 percent growth. It is clear from our numbers that users have been putting steady investment into RTL and gate-level tools for the past few years, as the "RTL and Below" market has been on the upswing since 2009.

OVERVIEW

This report comprises the "RTL and Below" section of the EDA Market Trends. "RTL and Below" includes RTL (register transfer level), gate level and transistor level design tools. These tools, along with ESL (electronic system level) tools, make up the CAE market for EDA tools. In this report we will discuss market share, trends, and forecasts for the "RTL and Below" sub applications that have the most impact on the overall EDA landscape.

CLICK HERE TO PURCHASE
**"RTL Market Trends 2013:
Opportunities in the RTL Market"**
[\$3,000]

TABLE OF CONTENTS

Page	Title
1	Introduction
1	Opportunities in the RTL Market
2	RTL and Below Methodology
2	Sub-application Changes in RTL and Below for 2012
2	CAE and RTL Overview
3	RTL Design
4	RTL Simulation
5	Mixed-Language Simulation
6	Mixed-Signal Simulation
7	Formal Verification
8	Formal Analysis
9	Hardware/Software Co-Verification
9	RTL Synthesis
10	DFT
10	ATPG
12	Scan Chain Insertion
13	BIST
14	Fault Simulation
14	Rapid Prototyping
15	Design Analysis
16	Power Analysis
17	Signal Integrity and Timing Analysis
18	The Gate Level Methodology
18	Analog Simulation
19	RF Design & Simulation
20	Miscellaneous
20	Enterprise Tools
22	Interoperability Tools
23	Design Libraries

TABLE OF FIGURES

Page	Title
3	Figure R-1: RTL Revenue by Sub-application 2012
	Figure R-2: RTL Design Market Share 2012
4	Figure R-3: RTL Design Forecast 2013
5	Figure R-4: Mixed-Language Simulation Market Share 2012
	Figure R-5: Mixed-Language Simulation Forecast 2013
6	Figure R-6: Mixed-Signal Simulation Market Share 2012
	Figure R-7: Mixed-Signal Simulation Forecast 2013
7	Figure R-8: Formal Verification Market Share 2012
	Figure R-9: Formal Verification Forecast 2013
8	Figure R-10: Formal Analysis Market Share 2012
	Figure R-11: Formal Analysis Forecast 2013
9	Figure R-12: RTL Synthesis Market Share 2012
10	Figure R-13: RTL Synthesis Forecast 2013
11	Figure R-14: ATPG Market Share 2012
	Figure R-15: ATPG Forecast 2013
12	Figure R-16: Scan Market Share 2012
	Figure R-17: Scan Forecast 2013
13	Figure R-18: BIST Market Share 2012
	Figure R-19: BIST Forecast 2013
14	Figure R-20: Rapid Prototyping Market Share 2012
15	Figure R-21: Rapid Prototyping Forecast 2013
16	Figure R-22: RTL Power Analysis Market Share 2012
	Figure R-23: RTL Power Analysis Forecast 2013

TABLE OF FIGURES (CONTINUED)

Page	Title
17	Figure R-24: Timing and Signal Integrity Market Share 2012 Figure R-25: Timing and Signal Integrity Forecast 2013
18	Figure R-26: Analog Simulation Market Share 2012 Figure R-27: Analog Simulation Forecast 2013
19	Figure R-28: RF Design and Simulation Market Share 2012 Figure R-29: RF Design and Simulation Forecast 2013
21	Figure R-30: Enterprise Tools Market Share 2012 Figure R-31: Enterprise Tools Forecast 2013
22	Figure R-32: Interoperability Tools Market Share 2012 Figure R-33: Interoperability Tools Forecast 2013
23	Figure R-34: Design Libraries Market Share 2012 Figure R-35: Design Libraries Forecast 2013
45	Appendix B: RTL and Below Sub-application Forecast

CLICK HERE TO PURCHASE
"RTL Market Trends 2013: Opportunities in the RTL Market"
[\$3,000]