

## Electronic System Level (ESL) Market Trends 2014 ESL 2013 – A Slow Takeoff

[www.garysmithEDA.com](http://www.garysmithEDA.com)

## Electronic System Level (ESL) Market Trends 2014 ESL – The Year of the Flow

### EXECUTIVE SUMMARY

2013 was a slow year for **ESL**. It has been the methodology of the future since 1996 and saw the first large-scale adoption in 2011 along with the realization that the commercial tool flow was not complete. A completed flow then followed in 2013. This was followed by a slow take-off. Let's see what 2014 will look like.

That was good news for **RTL** as in general its growth was strong. Although you need to be careful as some of the RTL sub-apps will experience the slow growth we have been expecting for this methodology.

**IC CAD** continues to grow well as we are entering the era of new silicon technology. With the introduction of FinFETs we may be entering a node by node major technology introduction. If true, that means the EDA vendors just had its innovation cycle cut in half.

**PCB** design, the methodology of the past, has become the entry point to the wonderful new world of System Design Automation (SDA). PCB itself is being teamed-up with MCM design; 2D, 2 & ½D design, and 3D design; MEMS Design and Mechanical Design. This is giving Mentor and Cadence a door to the future.

#### A New Focus

Now that we are entering the world of System Level Design we need to look at the market, and therefore the numbers, in a different way. Systems Design methodology, and business requirements, are developed in the vertical, industry markets. There is no one systems market. This presentation of the basic Market Trends numbers in a different way is called second-cut reports. They are usually done as an on-demand report but some have been repeated on a more regular basis. The Analog Market Trends report is the prime example of a second-cut report. Our next attempt will be a System Level report. As we get further into this design methodology we may extend the report into multiple Industry reports, depending on demand.

### INTRODUCTION

Once we added Emulation to The ESL Flow we were expecting a fairly fast adoption. It didn't happen, we only grew 3.6%. Until we are sure of what is happening we have been conservative in our forecast. 2014 looks good, but we'll need the year-end reports before we can change our growth rate.

Once we are far enough into the adoption of the EDA flow, that is being driven by the Semiconductor Multi-Platform Based Design flow, we can do a much better job of outlining the future. Many of our predictions are coming true, even though some are taking decades instead of years before being adopted. One thing the 2013 numbers does show is "It's the Software Stupid" is truer than ever.

## OVERVIEW

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

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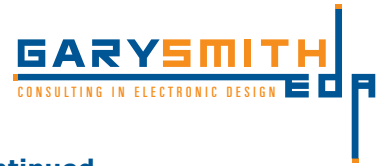
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