



PCB Market Trends 2014

Changing Roles in PCB Design

www.garysmithEDA.com

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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

The total worldwide revenue for the PCB application of EDA was \$798.3 million. This was less than a 2 percent growth over 2012.

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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TABLE OF CONTENTS

Page	Title
1	Market Summary
2	PCB Layout
3	PCB CAM
5	Schematic Capture
6	PCB SPICE
7	PCB Analysis Tools
9	MCM/Hybrid/Package Design
10	Cable Wire Harness

TABLE OF FIGURES

Page	Title
2	Figure P-1: Top 5 Share Worldwide PCB 2014
3	Figure P-2: PCB Layout Market Share 2013
	Figure P-3: PCB Layout Forecast 2014
4	Figure P-4: PCB CAM Market Share 2013
	Figure P-5: PCB CAM Forecast 2014
5	Figure P-6: Schematic Capture Market Share 2013
6	Figure P-7: Schematic Capture Forecast 2014
	Figure P-8: PCB SPICE Market Share 2013
7	Figure P-9: PCB SPICE Forecast 2014
8	Figure P-10: PCB EMI Market Share 2013
	Figure P-11: PCB Signal Integrity Market Share 2013
	Figure P-12: PCB Thermal Market Share 2013
9	Figure P-13: PCB Timing Market Share 2013
	Figure P-14: PCB Physical Analysis Tools Forecast 2014
10	Figure P-15: Cable/Wire Harness Market Share 2013
11	Figure P-16: Cable/Wire Harness Market Forecast 2014
12	Appendix A: PCB Forecast 2014

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