



RTL Market Trends 2014 The Future for RTL

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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 "RTL and Below" market turned in solid growth in 2013, growing slightly under 8 percent to reach \$2,374 million in 2013. Since 2009, the RTL and Below market has been gradually growing, though always in the single digits. It is clear from our numbers that users have continued to put steady investment into RTL and gate-level tools for the past four years.

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.

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