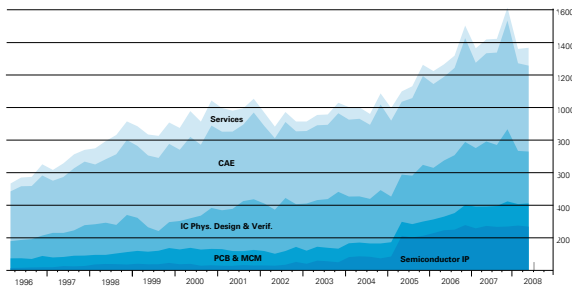


## Industry Revenue down Slightly in Second Quarter 2008

Source EDA Consortium, Market Statistics Service Press Release



**Chart 5.01:** EDA and SIP Revenue, Q1 1996 to Q2 2008 [in Million US-\$]

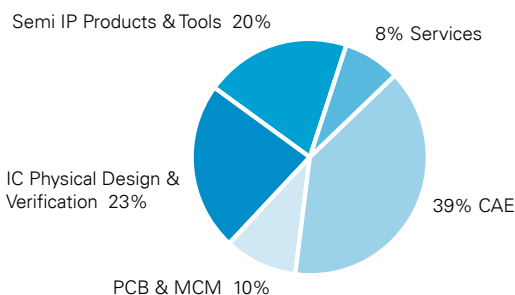
SAN JOSE, California, October 9, 2008—The EDA Consortium (EDAC) Market Statistics Service (MSS) today announced that the electronic design automation (EDA) industry revenue for Q2 2008 declined 3.7 % to \$1357.4 million compared to \$1408.8 million in Q2 2007.

“Solid year over year growth in the PCB/MCM and services segments were offset by declines in CAE, IC Physical Design & Verification, and Semiconductor IP, resulting in an overall decline for Q2, 2008,” said Walden C. Rhines, EDAC chair and Mentor Graphics’ CEO and chairman. “Geographically, Western Europe and Japan showed growth in Q2, but this growth was offset by declines in North America and the rest of the world.”

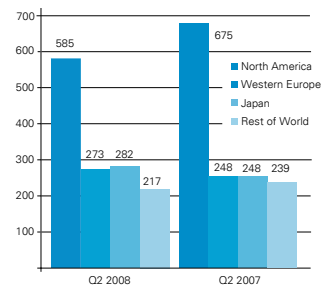
Companies that were tracked employed 28,004 professionals in Q2 2008, up 7 % from the 26,164 employed in Q2 2007.

### Revenue by Product Category

EDA’s largest category, Computer Aided Engineering (CAE), generated revenue of \$524.7 million in Q2 2008, representing a 2.6 % decrease over the same period in 2007. The four quarter moving average CAE growth rate was positive at 6.8 %. For IC Physical Design & Verification, the next largest category, revenue decreased to \$317.1 million in Q2 2008, a 20.2 % decrease compared to Q2 2007. The four quarter moving average growth rate declined 2.6 % for IC Physical Design & Verification.



**Chart 5.03:** Distribution of the total EDA & SIP Revenue of Q2 2008 by Product Category



**Chart 5.02:** Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-\$]

Printed Circuit Board and Multi-Chip Module (PCB & MCM) revenue increased 19.3 % over Q2 2007 to \$141.6 million. The four quarter moving average growth rate for PCB & MCM showed a 1 % decrease. Semiconductor Intellectual Property (SIP) revenue totaled \$264.9 million in Q2 2008, a 1.6 % decrease over Q2 2007. The four quarter moving average growth rate for SIP was slightly down at 0.8 %.

### Revenue by Consuming Region

North America 585 Western Europe 273 Japan 282 Rest of World 217

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edacentrum, Hannover, Dezember 2008

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