EDA Consortium Reports Industry Revenue Down in Third Quarter 2008

Source EDA Consortium, Market Statistics Service Press Release

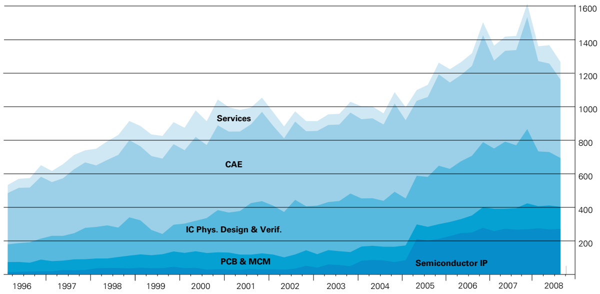

Chart 5.01: EDA and SIP Revenue, Q1 1996 to Q3 2008 [in Million US-$]

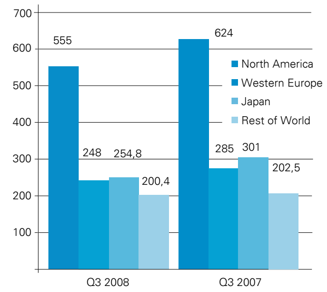

Chart 5.02: Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-$]

SAN JOSE, California, January 12, 2009—The EDA Consortium (EDAC) Market Statistics Service (MSS) today announced that the electronic design automation (EDA) industry revenue for Q3 2008 declined 10.9 % to $ 1258.6 million compared to $ 1412.1 million in Q3 2007. The four-quarter moving average declined 2.8 %. Note that revenue numbers which include Q1 and Q2 2008 reflect a restatement of those numbers.

"Surprisingly high year-over-year growth in the services segment and a small increase in PCB design tools and Semiconductor IP were offset by declines in CAE and IC Physical Design & Verification, resulting in an overall decline for Q3, 2008," said Walden C. Rhines, EDAC chair and Mentor Graphics CEO and chairman. "While the double-digit drop affected all regions except Rest of World (ROW), which showed only 1 % decline, all regions except North America had a positive four-quarter moving average. This illustrates the sharpness of the decline in third quarter."

Companies that were tracked employed 28,176 professionals in Q3 2008, up 3.4 % from the 27,254 employed in Q3 2007, and 6 % over the 28,004 employed in Q2, 2008.

Revenue by Product Category

EDA's largest category, Computer Aided Engineering (CAE), generated revenue of $465.4 million in Q3 2008, representing a 17.6 % decrease over the same period in 2007. The four-quarter moving average CAE growth rate declined slightly at 1.9 %, including the impact of the Q1 and Q2 2008 restatement. In the next largest category, IC Physical Design & Verification, revenue decreased to $ 298.7 million in Q3 2008, a 22.3 % decrease compared to Q3 2007. The four-quarter moving average growth rate declined 10.1 % for IC Physical Design & Verification. Printed Circuit Board and Multi-Chip Module (PCB & MCM) revenue increased 2.5 % over Q3 2007 to $ 130.9 million. The four-quarter moving average growth rate for PCB & MCM showed an 0.4 % increase. Semiconductor Intellectual Property (SIP) revenue totaled $ 267.8 million in Q3 2008, a 1.8 % increase over Q3 2007. The four-quarter moving average growth rate for SIP was slightly down at 1.2 %. Services revenue was $ 104.8 million in Q3 2008, up 25 % from Q3 2007. The four-quarter moving average growth rate for services was up 14 %.

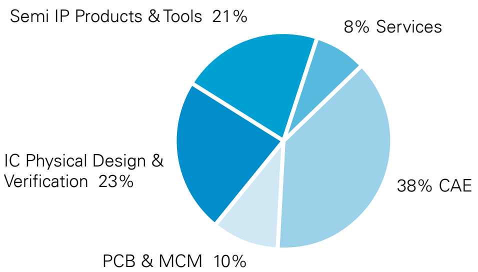

Chart 5.03: Distribution of the total EDA & SIP Revenue of Q3 2008 by Product Category

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edacentrum, Hannover, April 2009

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