

# EDA Consortium Reports Industry Revenue Down in First Quarter 2009

Source EDA Consortium, Market Statistics Service Press Release

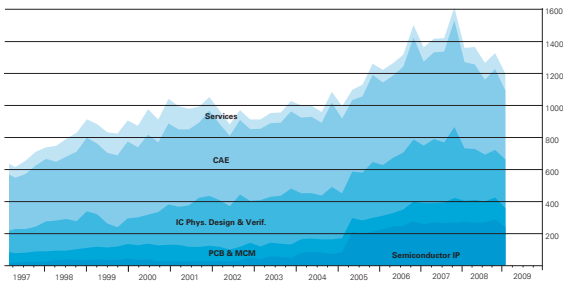


Chart 5.01: EDA and SIP Revenue, Q1 1997 to Q1 2009 [in Million US-\$]

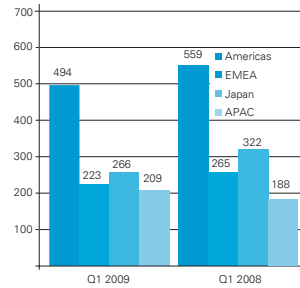


Chart 5.02: Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-\$]

The EDA Consortium (EDAC) Market Statistics Service (MSS) today announced that the electronic design automation (EDA) industry revenue for Q1 2009 declined 10.7% to **\$1192.1 million, compared to \$1334.2 million** in Q1 2008, driven primarily by an accounting shift at one major EDA company. The four-quarter moving average declined 11.3%.

“The business environment remained difficult for EDA as for other industries, with Q1 EDA revenues declining in all regions except Asia Pacific,” said Walden C. Rhines, EDA Consortium chair and Mentor Graphics CEO and chairman. “Nevertheless, for Q1, the overall decline was less than for the previous quarter.” Companies that were tracked employed 26,561 professionals in Q1 2009, down 2.8% from the 27,329 employed in Q1 2008, and down 2.7% from the 27,311 employed in Q4, 2008.

### Revenue by Product Category

Computer Aided Engineering (CAE), EDA’s largest category, generated revenue of \$427.9 million in Q1 2009. This represents an 18.8% decrease over the same period in 2008. The four-quarter moving average for CAE declined 16.8%.

In the next largest category, IC Physical Design & Verification, revenue decreased to \$302.2 million in Q1 2009, a 5.4% decrease compared to Q1 2008. The four-quarter moving average declined 21.6% for IC Physical Design & Verification.

Printed Circuit Board and Multi-Chip Module (PCB & MCM) revenue decreased 7.1% compared to Q1 2008,

to \$119.9 million. The four-quarter moving average for PCB & MCM decreased 0.6%. -more Q1 2009 EDA Industry Revenue Semiconductor Intellectual Property (SIP) revenue totaled \$236.3 million in Q1 2009, a 12.8% decrease compared to Q1 2008. The four-quarter moving average for SIP decreased 1.4%. Services revenue was \$105.7 million in Q1 2009, an increase of 20.4% compared to Q1 2008. The four-quarter moving average for services was up 24.6%.

### Revenue by Consuming Region

The Americas, EDA’s largest region, purchased \$494 million of EDA products and services in Q1 2009, representing an 11.6% decrease compared to Q1 2008. The four-quarter moving average was down 15.4% for the region.

Europe, the Middle East, and Africa (EMEA) revenue was down 15.9% in Q1 2009 compared to Q1 2008, with revenues of \$223.2 million. The four-quarter moving average for Western Europe was down 7.5%. Q1 2009 revenue from Japan decreased 17.7% to \$265.5 million compared to Q1 2008. The four-quarter moving average for Japan decreased 10.8%.

### About the MSS Report

The EDA Consortium Market Statistics Service reports EDA industry revenue data quarterly and is available by

The Asia/Pacific (APAC) region increased to \$209.4 million in Q1 2009, an 11.5% increase compared to the same quarter in 2008. The four-quarter moving average declined 4.7%.

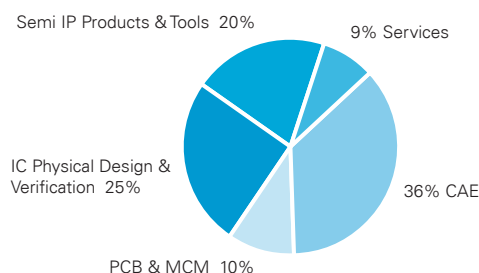


Chart 5.03: Distribution of the total EDA & SIP Revenue of Q1 2009 by Product Category

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