

EDA Consortium Reports Industry Revenue Down in Third Quarter 2009

Source EDA Consortium, Market Statistics Service Press Release

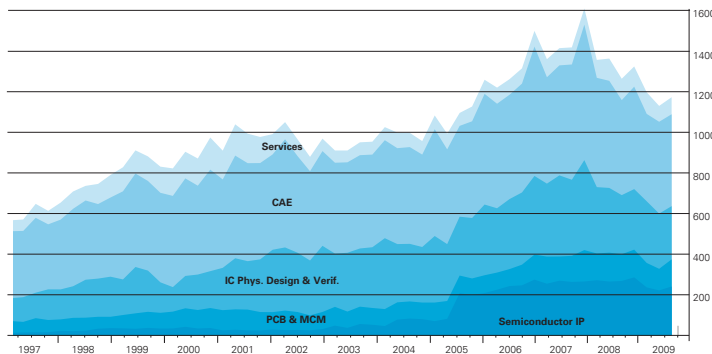


Chart 5.01: EDA and SIP Revenue, Q1 1997 to Q3 2009 [in Million US-\$]

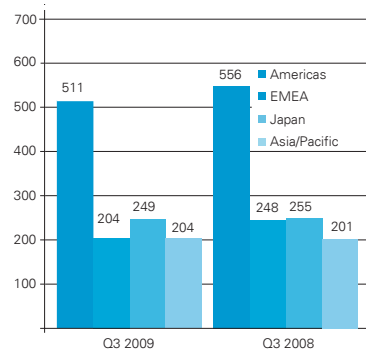


Chart 5.02: Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-\$]

The EDA Consortium (EDAC) Market Statistics Service (MSS) today announced that the Electronic Design Automation (EDA) industry revenue for Q3 2009 is \$1,167.9 million, a 3.8 % sequential increase from Q2. On a Q3/Q3 basis, EDA industry revenue declined 7.2 %, compared to \$1,258.6 million in Q3 2008. The four-quarter moving average declined 13.1 %.

“Just as the semiconductor industry has experienced sequential growth, the EDAC revenue numbers similarly represent a sequential increase over the previous quarter,” said Wally Rhines, EDAC chair and chairman and CEO of Mentor Graphics. “Most notable sequential increases were in the categories of printed circuit board, semiconductor IP, and services.”

Companies that were tracked employed 25,942 professionals in Q3 2009, down 7.9 % from the 28,176 employed in Q3 2008, and down 1.4 % from the 26,298 employed in Q2 2009.

Revenue by Product Category

Computer Aided Engineering (CAE), EDA’s largest category, generated a revenue of \$450.1 million in Q3 2009. This represents a 3.3 % decrease over the same period in 2008. The four-quarter moving average for CAE declined by 15.6 %. In the next largest category, IC Physical Design & Verification, revenue decreased to \$260.8 million in Q3 2009, a 10.0 % decrease com-

pared to Q3 2008. The four-quarter moving average declined 16.9 % for IC Physical Design & Verification. Printed Circuit Board and Multi-Chip Module (PCB & MCM) revenue increased 1.5 % compared to Q3 2008, to \$132.9 million. The four-quarter moving average for PCB & MCM decreased 10.6 %. Semiconductor Intellectual Property (SIP) revenue totaled \$240.7 million in Q3 2009, a 10.1 % decrease compared to Q3 2008. The four-quarter moving average for SIP decreased 8.0 %. Services revenue was \$83.5 million in Q3 2009, a decrease of 20.3 % compared to Q3 2008. The four-quarter moving average for services decreased 4.0 %.

Revenue by Consuming Region

The Americas, EDA’s largest region, purchased \$511.2 million of EDA products and services in Q3 2009, representing an 8.0 % decrease compared to Q3 2008. The four-quarter moving average was down 14.1 % for

EMEA: Europe, Middle East, Africa
APAC: Asia/Pacific

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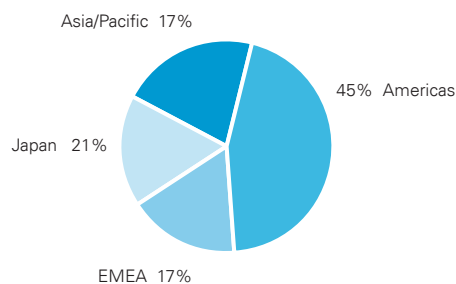


Chart 5.03: Distribution of the total EDA & SIP Revenue of Q3 2009 by Product Category

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