EDA Consortium Reports Decrease For 2009 But Sequential Fourth Quarter Gains

Source EDA Consortium, Market Statistics Service Press Release

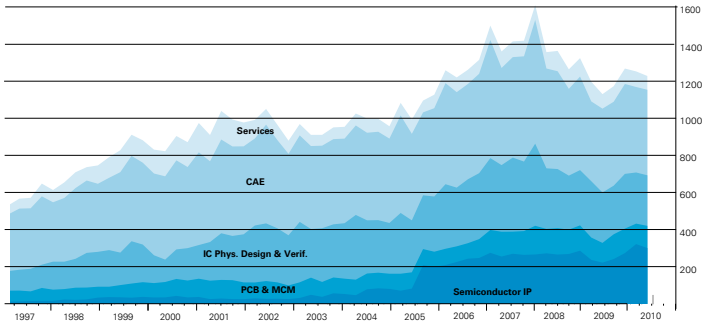

Chart 5.01: EDA and SIP Revenue, Q1 1997 to Q2 2010 [in Million US-$]

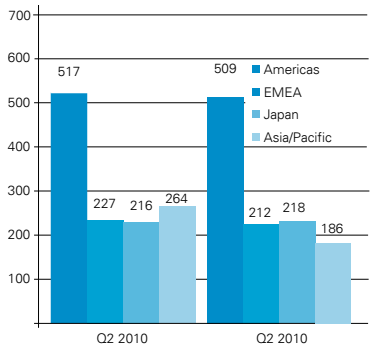

Chart 5.02: Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-$]

The EDA Consortium (EDAC) Market Statistics Service (MSS) announced that the Electronic Design Automation (EDA) industry revenue for Q2 2010 was $ 1222.9 million, an 8.7 percent increase compared to $ 1125.5 million in Q2 2009. Sequential EDA revenue declined 1.9 percent, while the four-quarters moving average, which compares the most recent four quarters to the prior four quarters, increased by 0.1 percent.

"The second quarter results showed increases in all categories compared to Q2 2009, with double digit increases in SIP and PCB/MCM," said Wally Rhines, EDAC chair and chairman and CEO of Mentor Graphics. "Geographically, the Americas, Europe/Middle East/Africa region, and Asia/Pacific all increased relative to Q2 2009, with the Americas and Europe/Middle East/Africa also increasing compared to Q1 2010." Companies that were tracked employed 25,968 professionals in Q2 2010, down 0.5 percent compared to Q1 2010, and down 1.3 percent from the 26,298 employed in Q2 2009.

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

Revenue by Product Category

Computer Aided Engineering (CAE), EDA's largest category, generated revenue of $ 458.8 million in Q2 2010. This represents a 2 percent increase over the same period in 2009. The four-quarters moving average for CAE increased 0.3 percent. IC Physical Design & Verification revenue increased to $ 271.2 million in Q2 2010, a 0.2 percent increase compared to Q2 2009. The four-quarters moving average declined 5.1 percent. Printed Circuit Board and Multi-Chip Module (PCB & MCM) revenue increased 12.6 percent compared to Q2 2009, to $ 119.1 million. The four-quarters moving average for PCB & MCM was essentially flat. Semiconductor Intellectual Property (SIP) revenue totaled $ 299.8 million in Q2 2010, a 35.3 percent increase compared to Q2 2009. The four-quarters moving average increased 12.1 percent. Services revenue was $ 74.0 million in Q2 2010, a decrease of 4.8 percent compared to Q2 2009. The four-quarters moving average decreased 16.3 percent.

Revenue by Consuming Region

The Americas, EDA's largest region, purchased $ 516.8 million of EDA products and services in Q2 2010, representing an increase of 1.5 percent compared to Q2 2009. The four-quarters moving average for the Americas declined 2.2 percent. Revenue in Europe, the Middle East, and Africa (EMEA) was up 6.7 percent in Q2 2010 compared to Q2 2009 on revenues of $ 226.6 million. The EMEA four-quarters moving average was down 6.5 percent. Second quarter 2010 revenue from Japan decreased 1.0 percent to $ 215.5 million compared to Q2 2009. The four-quarters moving average for Japan decreased 4.8 percent. The Asia/Pacific (APAC) region increased to $ 263.9 million in Q2 2010, a 41.7 percent increase compared to the same quarter in 2009. The four-quarters moving average increased 20.5 percent.

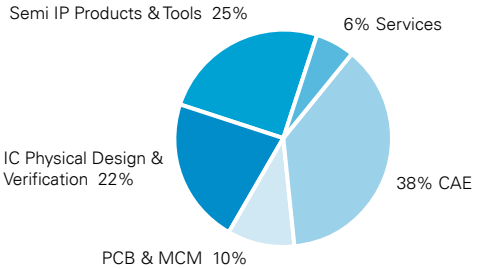

Chart 5.03: Distribution of the total EDA & SIP Revenue of Q2 2010 by Product Category

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