

EDA Consortium Reports Revenue Increase for Q4 2012

Source EDA Consortium, Market Statistics Service Press Release

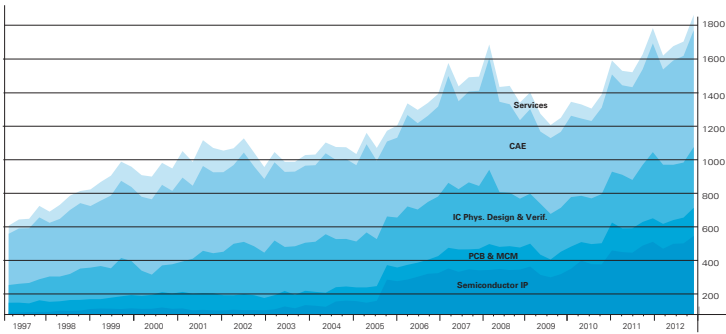


Chart 5.01: EDA and SIP Revenue, Q1 1997 to Q4 2012 [in Million US-\$]

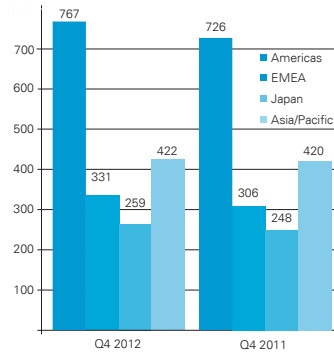


Chart 5.02: Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-\$]

SAN JOSE, California, April 1, 2013 — The EDA Consortium (EDAC) Market Statistics Service (MSS) today announced that the Electronic Design Automation (EDA) industry revenue increased 4.6 % for Q4 2012 to \$1779.1 million, compared to \$1700.1 million in Q4 2011. Sequential EDA revenue for Q4 2012 increased 9.8 % compared to Q3 2012, while the four-quarters moving average, which compares the most recent four quarters to the prior four quarters, increased by 6.7 %.

“The EDA industry finished 2012 with a record quarter,” said Walden C. Rhines, board sponsor for the EDAC MSS and chairman and CEO of Mentor Graphics. “CAE, IP and PCB were all strong, with PCB at 19.5 % growth more than double that of any other major category. Geographically, all of the regions reported positive growth, with the Europe/Middle East/Africa region leading the way.”

Companies that were tracked employed 29,578 professionals in Q4 2012, an increase of 7.1 % compared to the 27,623 people employed in Q4 2011, and up 2.4 % compared to Q3 2012.

Revenue by Product Category

The largest category, Computer Aided Engineering (CAE), generated revenue of \$693.0 million in Q4 2012, which represents a 7.5 % increase over Q4 2011. The four-quarters moving average for CAE increased 9.8 %. IC Physical Design & Verification revenue decreased

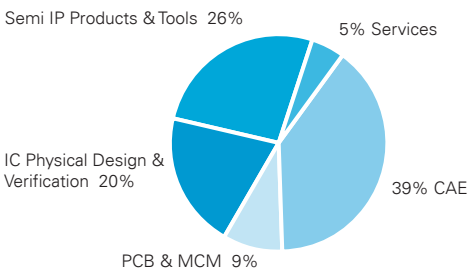


Chart 5.03: Distribution of the total EDA & SIP Revenue of Q4 2012 by Product Category

to \$360.4 million in Q4 2012, an 8.2 % decrease compared to Q4 2011. The four-quarters moving average increased 2.2 %. Printed Circuit Board and Multi-Chip Module (PCB & MCM) revenue of \$167.0 million represents an increase of 19.5 % compared to Q4 2011. The four-quarters moving average for PCB & MCM increased 7.6 %. Semiconductor Intellectual Property (SIP) revenue totaled \$467.4 million in Q4 2012, an 8.1 % increase compared to Q4 2011. The four-quarters moving average increased 7.7 %. Services revenue was \$91.3 million in Q4 2012, an increase of 0.5 % compared to Q4 2011. The four-quarters moving average decreased 3.0 %.

Revenue by Region

The Americas, EDA’s largest region, purchased \$767.1 million of EDA products and services in Q4 2012, an increase of 5.6 % compared to Q4 2011. The four-quarters moving average for the Americas increased 7.4 %. Revenue in Europe, the Middle East, and Africa (EMEA) was up 8.1 % in Q4 2012 compared to Q4 2011 on revenues of \$331.0 million. The EMEA four-quarters moving average increased 6.8 %. Fourth quarter 2012 revenue from Japan increased 4.4 % to \$259.1 million compared to Q4 2011. The four-quarters

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

The complete MSS report,

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edacentrum, Hannover, 30. April 2013