



Each quarter, the ESD Alliance publishes the Electronic Design Market Data (EDMD) report containing detailed revenue data for the EDA, Semiconductor IP, and design services industries. The report compiles data submitted confidentially by both public and private EDA and SIP companies into tables and charts listing the data by both product category and geographic region. This newsletter highlights the results for the fourth quarter of 2023. Additional details are available in the [press release](#). The full report is available in the [SEMI Store](#). Information about the EDMD report is available at <https://www.semi.org/en/communities/esda/EDMD>.

Overall, fourth quarter 2023 industry revenues increased 14% compared to Q4, 2022. Total revenue for Q4 was \$4,423 million. Figures 1 and 2, below, summarize the revenue growth for Q4 2023 compared to Q4 2022, detailed by category (figure 1) and geographic region (figure 2). The EDMD report contains many additional sub-categories, allowing companies to perform a more detailed analysis of revenues affecting their business. A complete list of categories is available [here](#).

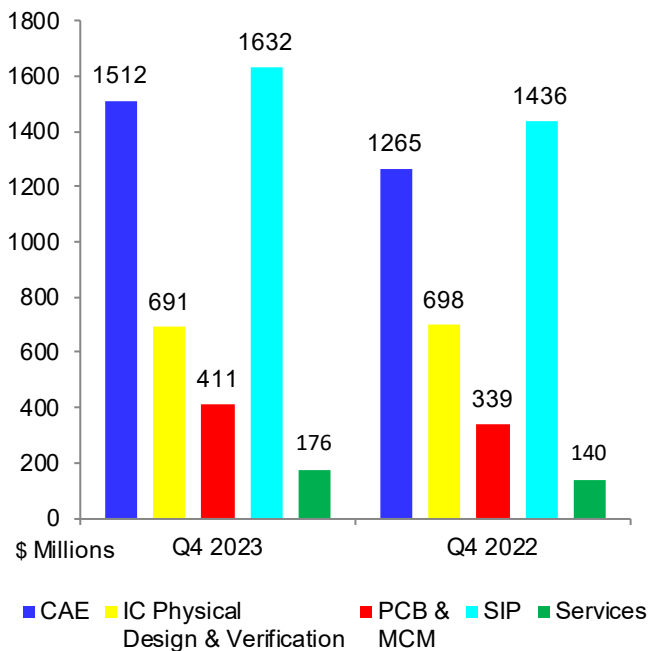


Figure 1: Q4 2023 revenue growth by category

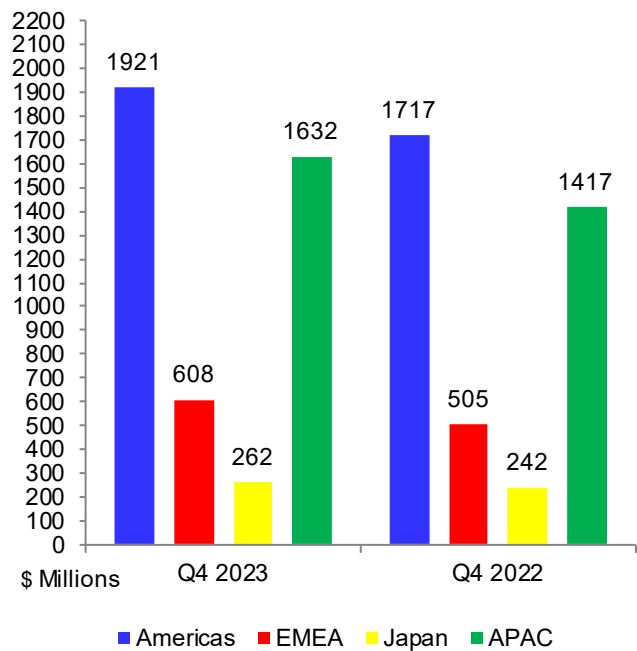


Figure 2: Q4 2023 revenue growth by region

Tables 1 and 2 detail the percentage growth for the industry by major category (table 1) and region (table 2).

Category	Revenue (\$Millions)	% Change
CAE	1512.1	19.5%
IC Physical Design & Verification	691.5	-1.0%
PCB & MCM	410.8	21.0%
SIP	1632.4	13.7%
Services	176.2	25.4%

Table 1: Q4 2023 revenue growth by category

Region	Revenue (\$Millions)	% Change
Americas	1921.0	11.9%
EMEA	608.2	20.5%
Japan	262.0	8.3%
APAC	1631.8	15.2%
Total	4423.0	14.0%

Table 2: Q4 2023 revenue growth by region

Figure 3 (below) shows the revenue percentages by major category. In Q4 2023, SIP was the largest category, followed by CAE. Geographically, the Americas is the largest consumer of EDA tools, followed closely by Asia Pacific (APAC). The remainder divided amongst Europe, Middle East, and Africa (EMEA) and Japan, as shown in Figure 4. The quarterly EDMD report includes additional details for the Asia Pacific region.

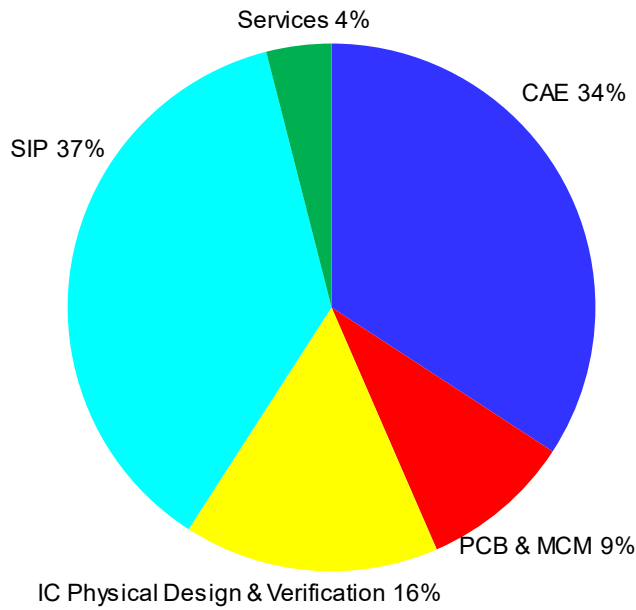


Figure 3: Q4 2023 revenue percentage by category

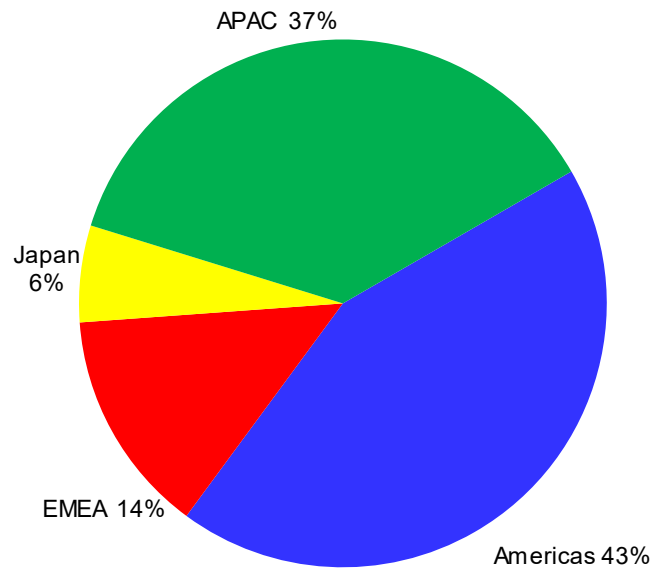


Figure 4: Q4 2023 revenue percentage by region

Figure 5 shows the historical revenue for the major categories (CAE, PCB & MCM, IC Physical Design and Verification, SIP and Services) from Q1 1996 through Q4 2023. Each quarter's EDMD report contains detailed data for the current year as well as the previous 3 years quarterly data in both tabular and graphical formats.

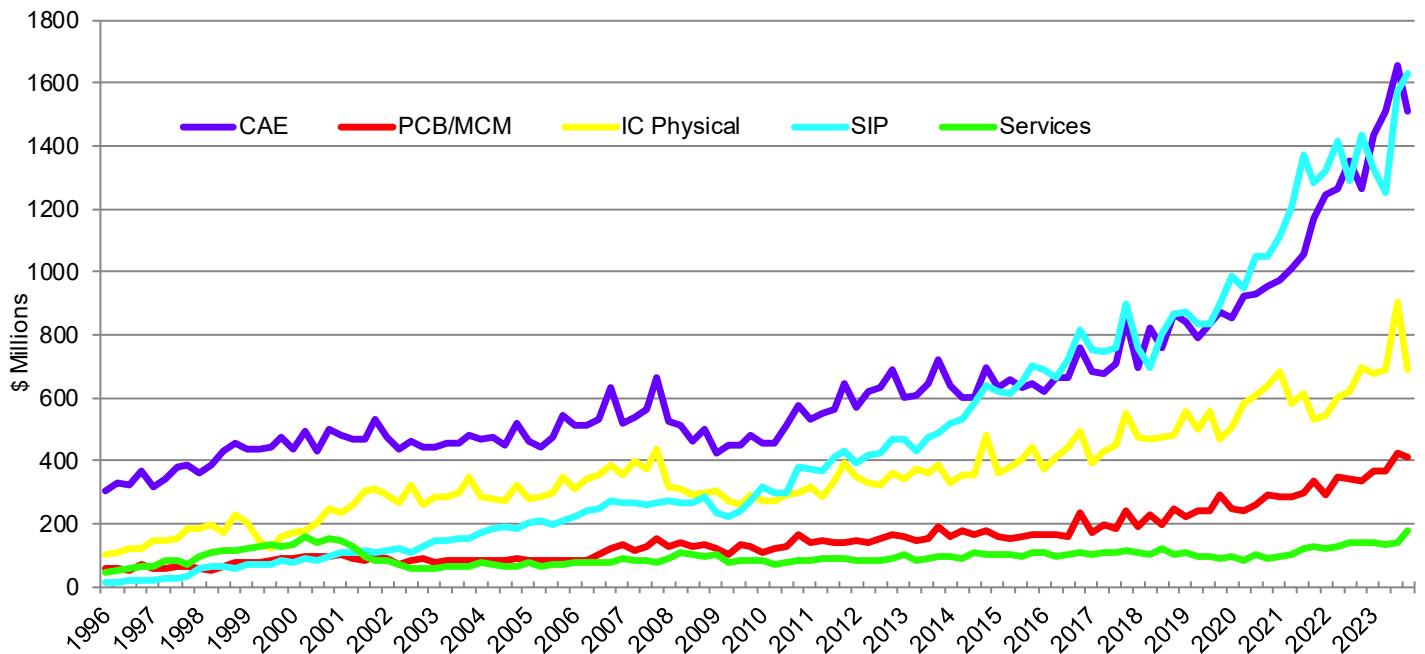


Figure 5: Revenue history, 1996 – present

Revenue data is reported confidentially to an independent accountant, which allows both public and private companies to report revenue data by detailed category. Individual company data is not reported, and steps are taken to further protect individual data for categories with a small number of reporting companies. Contributing data is free, and contributors will receive a discounted price for the EDMD report. The full report includes substantially more detailed information for industry revenues by category and region, providing the information companies need to analyze industry trends. The full report is available for single copy or subscription purchase in the [SEMI Store](#).

[For more information on the EDMD report](#), including information on contributing data, or on the benefits of joining the ESD Alliance, please visit the [ESD Alliance web site](#), or [contact us](#).

<p>The ESD Alliance, a SEMI Technology Community — <i>Where Electronics Begins</i> The ESD Alliance EDMD newsletter is a publication of the ESD Alliance, a SEMI Technology Community. For more information, visit: esd-alliance.org Q4, 2023 Electronic System Design Alliance, 673 South Milpitas Blvd, Milpitas, CA 95035. Phone (408) 943-6900</p>	
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