EDMD NEWSLETTER Third Quarter 2025

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 third quarter of 2025. 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, third-quarter 2025 industry revenues increased 8.8% compared to Q3, 2024. Total revenue for Q3 was $5,566.4 million. Figures 1 and 2 summarize the revenue growth for Q3 2025 compared to Q3 2024, 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.

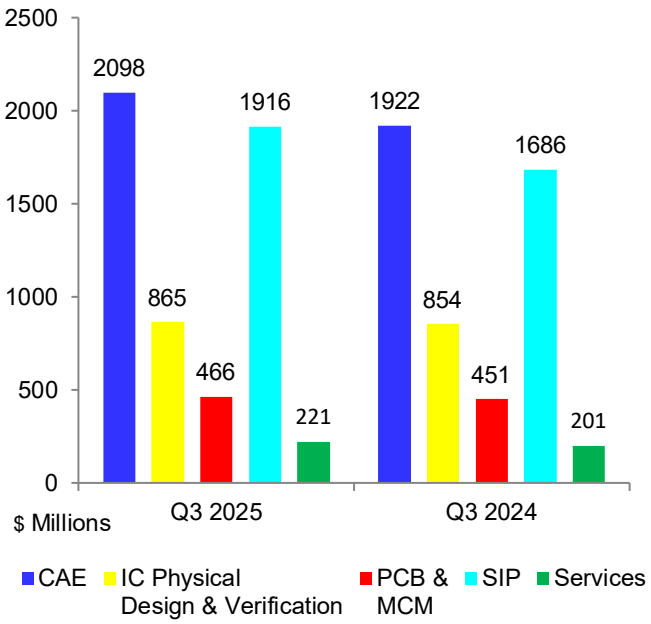


Figure 1: Q3 2025 revenue growth by category

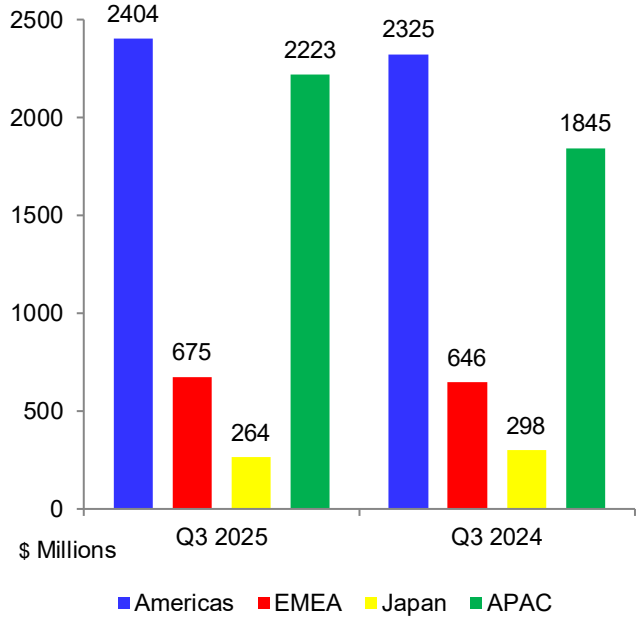


Figure 2: Q3 2025 revenue growth by region

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	2097.8	9.1%
IC Physical Design & Verification	865.4	1.3%
PCB & MCM	466.2	3.4%
SIP	1915.7	13.6%
Services	221.4	10.2%

Table 1: Q3 2025 revenue growth by category

Region	Revenue ($Millions)	% Change
Americas	2404.2	3.4%
EMEA	675.1	4.6%
Japan	264.0	-11.5%
APAC	2223.0	20.5%
Total	**5566.4**	**8.8%**

Table 3: Q3 2025 revenue growth by region

Figure 3 shows the revenue percentages by major category. In Q1 2025, SIP was the largest category, followed by CAE. Geographically, the Americas is the largest consumer of EDA tools, followed by Asia Pacific (APAC). The remainder is

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.

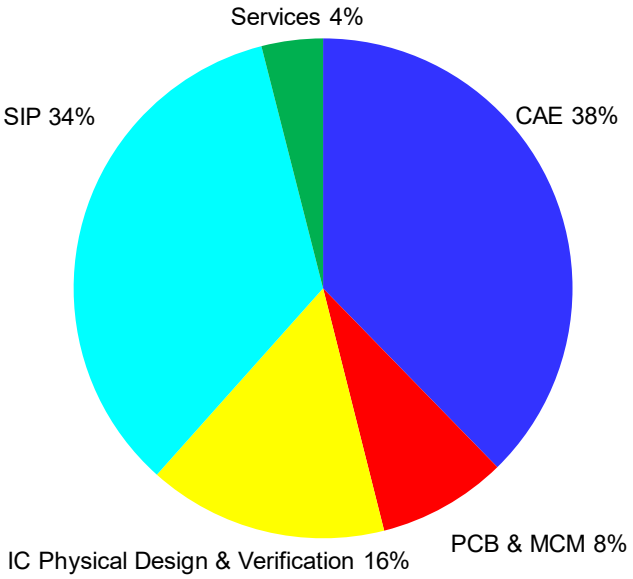


Figure 3: Q3 2025 revenue percentage by category

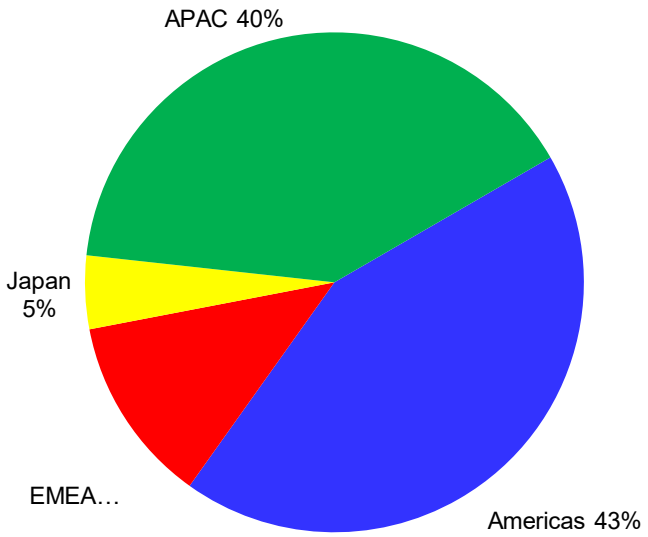


Figure 4: Q3 2025 revenue percentage by region

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 Q3 2025. 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.

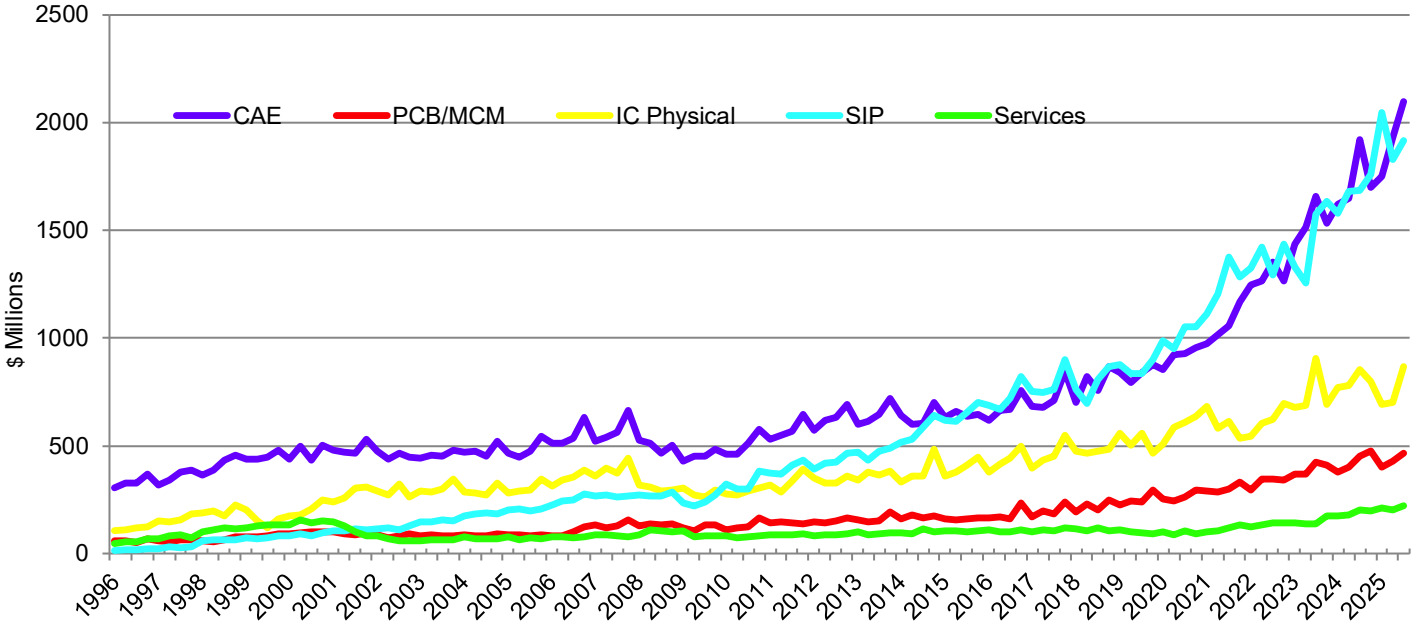


Figure 5: Revenue history, 1996 – present

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.

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