



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 first quarter of 2026. The full report is available in the [SEMI Store](#). Details, including the list of categories, are available at <https://semi.org/en/communities/esda/EDMD>.

Overall, first-quarter 2026 industry revenues increased 12.7% compared to Q1, 2025. Total revenue for Q1 was \$5,747.8 million. Figures 1 and 2, below, summarize the revenue growth for Q1 2026 compared to Q1 2025, 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.

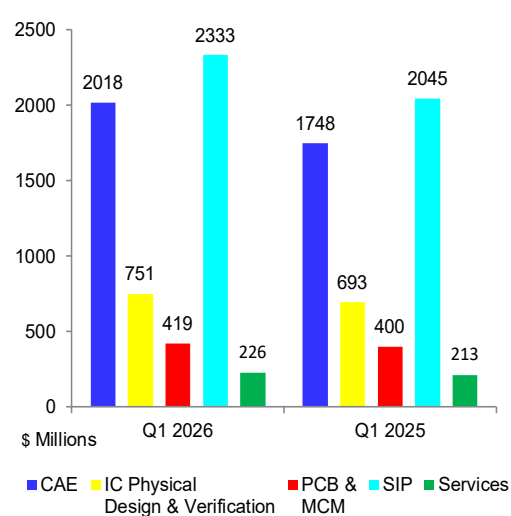


Figure 1: Q1 2026 revenue growth by category

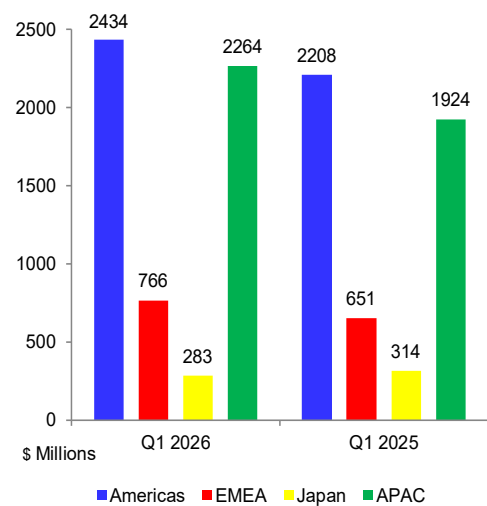


Figure 2: Q1 2026 revenue growth by region

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	2018.4	15.5%
IC Physical Design & Verification	751.3	8.3%
PCB & MCM	419.2	4.8%
SIP	2332.5	14.1%
Services	226.4	6.5%

Table 1: Q1 2026 revenue growth by category

Region	Revenue (\$Millions)	% Change
Americas	2433.8	10.2%
EMEA	766.4	17.6%
Japan	283.1	-9.9%
APAC	2264.4	17.7%
Total	5747.8	12.7%

Table 2: Q1 2026 revenue growth by region

Figure 3 (below) shows the revenue percentages by major category. In Q1 2026, 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 divided amongst Europe, Middle East, and Africa (EMEA) and Japan, as shown in Figure 4. The full quarterly EDMD report includes additional details for the Asia Pacific region.

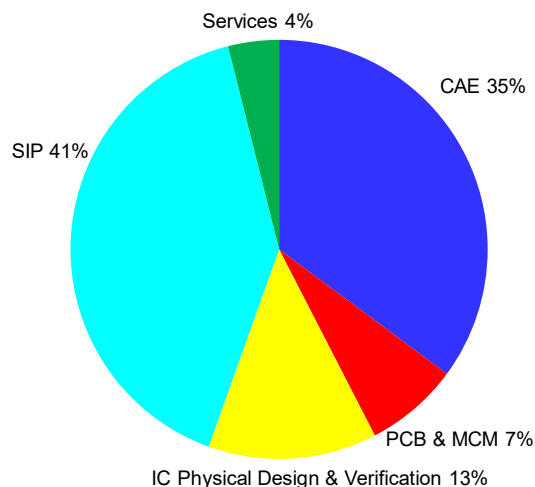


Figure 3: Q1 2026 revenue percentage by category

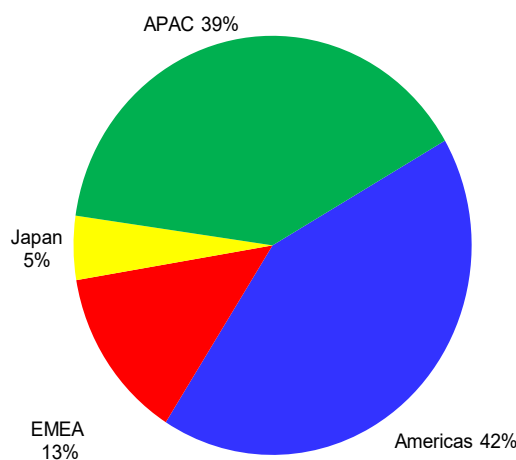


Figure 4: Q1 2026 revenue percentage by region

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 Q1 2026. 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.

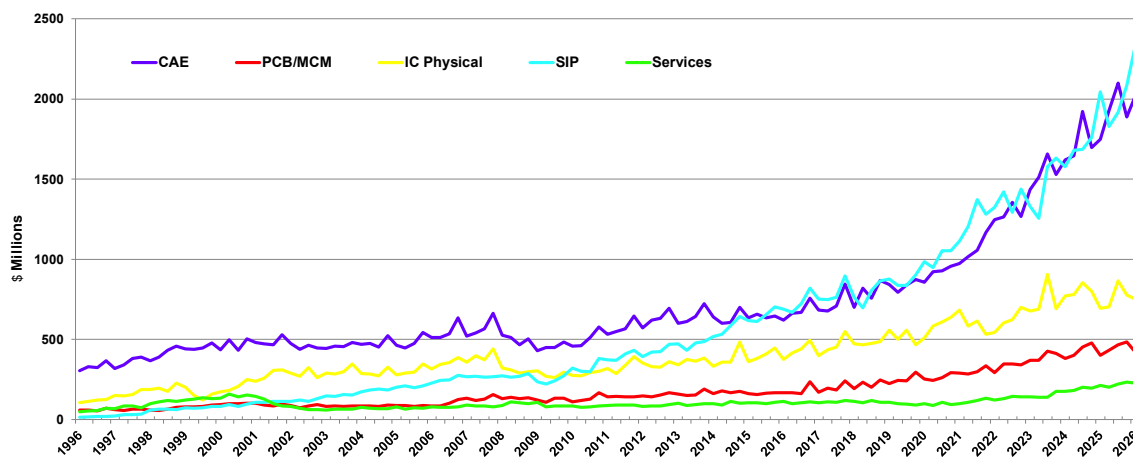


Figure 5: Revenue history, 1996 – present

Revenue data is reported confidentially to an independent accounting firm, 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 for workforce projections, production and growth scaling. 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 and receiving the full report, please visit <https://www.semi.org/en/communities/esda>.

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Governing Council	
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