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Global Model Based Development (MBD) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Model Based Development (MBD) market size is expected to reach $ 10990 million by 2032, rising at a market growth of 16.0% CAGR during the forecast period (2026-2032).

Model Based Development (MBD) refers to an engineering development methodology and associated software-and-services ecosystem in which executable models serve as central development artifacts for the design, simulation, implementation, verification and validation of embedded and control-intensive systems. The workflow typically connects functional and behavioral modeling with Model-in-the-Loop (MIL), Software-in-the-Loop (SIL), Processor-in-the-Loop (PIL) and Hardware-in-the-Loop (HIL) verification, while supporting automatic generation of production-oriented C/C++ or other target code, requirements traceability, calibration and target-hardware integration. In this study, Model Based Development (MBD) covers Software and Services delivered through Cloud Based or On-premises deployment models to Large Enterprises and SMEs, with primary applications across Automotive, Electronics and Semiconductor, Aerospace and Defence, Medical, Industrial and other embedded-system-intensive industries. The research scope centers on development environments, simulation and modeling platforms, automatic code-generation and verification tools, supporting engineering services and integrated workflows that use executable models to move engineering functions from requirements and algorithm design toward deployable software and hardware validation.

Key Findings

Model Based Development (MBD) unifies executable modeling, simulation, automatic

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code generation and xIL verification around embedded-system development

Automotive is the most mature application, supported by AUTOSAR, functional-safety requirements and software-defined vehicle architectures

FAA research indicates verification and validation can consume 50–70% of critical-software development resources, strengthening automation economics

Software is the core commercial layer, while Services remain essential for integration, migration, verification, compliance and development-process deployment

In this study's company ranking, Siemens and IBM lead the listed competitive set, followed by dSPACE and Zuken

Market Trends

Model Based Development (MBD) is evolving from predominantly desktop-oriented functional modeling and automatic code generation toward a connected engineering environment linking requirements, models, generated software, virtual ECUs, test assets and deployment targets throughout the development lifecycle. MIL, SIL, PIL and HIL are increasingly treated as a continuous verification chain rather than isolated engineering stages, while scalable SIL simulation is moving into cloud and high-performance computing environments to support parallel testing, geographically distributed engineering and continuous integration. Cloud-native modeling environments are also lowering infrastructure barriers and strengthening collaborative model management. In automotive, the transition toward software-defined vehicles is extending MBD from individual ECU functions toward more complex centralized and distributed software architectures. AUTOSAR's August 2026 release of CAPI 1.0, which combines Adaptive Platform specifications with executable source code and code generators, illustrates the broader industry shift toward closer integration between architecture, models, implementation and reusable software foundations. AI-assisted test generation, data-driven models and digital-twin integration are likely to further expand the role of models beyond design into continuous verification and post-development engineering.

Market Dynamics

Drivers

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The principal driver for Model Based Development (MBD) is the rising software and control complexity of embedded products. Electrification, ADAS and autonomous functions, centralized vehicle computing, sophisticated industrial control, increasingly programmable semiconductor platforms and software-intensive medical devices require engineering teams to validate functionality earlier and across substantially more operating conditions. Executable models allow algorithm behavior to be evaluated before final hardware becomes available and enable the same engineering logic to be reused for simulation, code generation and verification. This economic value is particularly important in safety-critical development, where FAA research has noted that verification and validation may consume 50–70% of software development resources. Functional-safety, software-quality and traceability requirements further reinforce demand for automated code generation, systematic testing and traceable model-to-code workflows.

Restraints

Adoption remains constrained by the cost and organizational complexity of building an effective end-to-end MBD toolchain. Enterprise projects frequently combine modeling environments, code generators, requirements platforms, compilers, target-specific libraries, simulation systems and test hardware from multiple vendors, creating integration, version-control and configuration-management burdens. Legacy handwritten software and historical test assets must coexist with generated code, while organizations need engineers capable of control modeling, embedded software, target-hardware optimization and verification. Model accuracy also places a practical limit on development efficiency: insufficient plant fidelity or incorrect assumptions can transfer errors into generated software and subsequent test stages. Target constraints such as processor performance, ROM/RAM capacity and software-tool compatibility further require model and code optimization rather than simple one-click deployment.

Opportunities

The strongest opportunities lie in extending Model Based Development (MBD) beyond isolated engineering workstations into scalable, connected development environments. Cloud Based simulation can make large test campaigns, shared model repositories and collaborative development more accessible, particularly for geographically distributed teams and SMEs that may not maintain extensive local simulation infrastructure. Semiconductor vendors can deepen adoption by connecting processor-specific models, peripheral blocksets and virtual platforms directly with mainstream modeling and code-

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generation environments, allowing software development and performance verification to begin before final hardware integration. Additional opportunities are emerging from AI-assisted modeling and test creation, automated parameter optimization, digital twins and continuous SIL/HIL pipelines. Expansion into aerospace and defence, industrial automation, robotics and regulated medical devices also increases the addressable application base as these industries seek earlier verification and stronger model-to-code traceability.

Challenges

The long-term challenge is maintaining semantic and behavioral consistency across requirements, executable models, generated code, test cases and target hardware as products become increasingly software-defined. Multi-vendor toolchains create interoperability and lifecycle-management challenges, while safety-critical programs require rigorous evidence that models, transformations and generated code behave as intended. Organizations must also control model variants, interfaces and reusable components across multiple product generations without allowing model complexity to offset the productivity benefits of MBD. The growing use of cloud infrastructure, AI-generated engineering artifacts and continuously updated software adds further governance requirements around reproducibility, cybersecurity, configuration control and certification. As development becomes more automated, competitive advantage will depend less on code generation alone and more on trustworthy end-to-end traceability, verification coverage and integration with existing engineering processes.

Value Chain Analysis

The Model Based Development (MBD) value chain begins with modeling languages and engineering standards, numerical solvers, physical and behavioral model libraries, processor architectures, compilers, middleware and computing infrastructure. The central value-creation layer consists of modeling and simulation software, automatic code-generation tools, virtual development environments, verification platforms and lifecycle-management capabilities that transform engineering models into reusable software and test assets. Services form a complementary layer covering model architecture, toolchain integration, legacy-model migration, verification strategy, functional-safety processes, calibration, customization, training and engineering outsourcing. Downstream customers are OEMs, Tier suppliers, semiconductor companies, aerospace and defence contractors, medical-device developers and industrial-equipment manufacturers. Economic value is created primarily by shifting

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verification earlier in the development cycle, reducing dependence on physical prototypes, reusing models and tests across product variants, automating implementation activities and connecting requirements more directly with executable behavior and production software.

Segment Insights

By Type, Software forms the technological foundation of the Model Based Development (MBD) market because modeling, simulation, code generation, virtual verification and lifecycle traceability are executed through software platforms. Services nevertheless represent a strategically important component because complex deployments require workflow design, tool integration, model migration, verification engineering, safety-process implementation and specialized embedded-development expertise. As customers move from departmental MBD projects toward enterprise-scale deployment, the boundary between software licensing and engineering services is becoming increasingly interconnected.

By Deployment Method, Cloud Based solutions are gaining strategic importance for scalable simulation, collaboration, continuous testing and distributed engineering, while On-premises deployment remains particularly relevant where proprietary models, controlled development environments, hardware-connected test infrastructure or safety-sensitive intellectual property require tighter local governance. By Organization Size, Large Enterprises have the strongest need for enterprise-scale model governance, variant management and complex multi-tool integration, whereas SMEs can increasingly access MBD through Cloud Based platforms, modular licensing and specialized engineering Services that reduce upfront infrastructure and skills requirements.

Downstream Market Opportunities

Automotive represents the most mature downstream environment for Model Based Development (MBD), where control algorithms, powertrain and electrification functions, chassis, body electronics, battery management, ADAS and increasingly software-defined vehicle functions are developed and validated through model-centered workflows. AUTOSAR Classic and Adaptive architectures, functional-safety requirements and the transition toward centralized computing increase the importance of reusable models, automatic code generation and continuous MIL/SIL/HIL verification. Electronics and Semiconductor is another important opportunity as MCU and SoC vendors connect device-specific models, virtual platforms and processor-level

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verification directly with engineering environments, allowing customers to evaluate algorithms and execution performance before hardware integration.

Aerospace and Defence offers attractive demand for high-integrity control, avionics and autonomous systems because model-based techniques can support early behavioral verification and certification-oriented development under frameworks such as DO-331. Industrial applications are expanding in motor control, robotics, power conversion, machinery and process automation as executable models increasingly connect control design with embedded C/C++ and PLC implementation. Medical applications provide a further opportunity in therapeutic, monitoring, diagnostic and surgical devices, where Model Based Development (MBD) can integrate requirements traceability, simulation, automatic code generation and verification into IEC 62304-oriented software workflows.

Regional Insights

Regional development reflects differences in automotive, aerospace, semiconductor and industrial-engineering ecosystems rather than a uniform adoption pattern. Europe represents an important MBD center because of its concentration of automotive OEMs, Tier suppliers, embedded-software engineering organizations and specialized simulation, testing and functional-safety tool vendors, with Germany and neighboring European engineering markets particularly influential in automotive MBD workflows. North America combines strong software-platform capabilities with aerospace and defence, advanced mobility, industrial technology and cloud-native engineering development, supporting demand for both established modeling environments and newer collaborative simulation platforms.

Asia-Pacific is increasingly important through its automotive-electronics, semiconductor and industrial-manufacturing base. Japan is notable for closer integration between semiconductor development environments and mainstream MBD workflows, including processor-specific MILS, PILS, virtual-platform and code-generation solutions. Across the broader Asia-Pacific market, vehicle electrification, intelligent mobility, automation and locally developed embedded electronics create opportunities for both global software suppliers and engineering-service providers. Regional competitive success therefore depends on local technical support, compatibility with established engineering ecosystems, industry-specific standards knowledge and integration with customers' target hardware and development processes.

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Competitive Landscape Analysis

The competitive landscape of Model Based Development (MBD) is structurally heterogeneous because suppliers compete at different layers of the engineering workflow. In this study's enterprise ranking, Siemens and IBM occupy the leading positions in the listed competitive set, followed by dSPACE and Zuken. The broader group includes platform software providers, simulation and verification specialists, semiconductor-linked development-tool suppliers and engineering-service companies. Competitive differentiation increasingly depends on the ability to connect requirements and system information with executable models, automatic code generation, MIL/SIL/PIL/HIL verification, target-hardware deployment and lifecycle traceability rather than offering an isolated modeling function.

A second competitive axis is ecosystem compatibility. Suppliers with strong integration into established model formats, AUTOSAR environments, embedded processors, compilers, requirements tools and test platforms can become embedded in customers' long-term engineering workflows and benefit from substantial switching costs. At the same time, cloud-native entrants and specialized service providers can compete through faster deployment, collaborative engineering, open programming ecosystems and reduced infrastructure requirements. As MBD workflows become more interconnected, vendors combining software capability with engineering expertise, verification depth and standards-oriented implementation are likely to hold stronger positions in safety-critical and large-scale enterprise programs.

Report Scope

This report studies the global Model Based Development (MBD) demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Model Based Development (MBD), and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Model Based Development (MBD) that contribute to its increasing demand across many markets.

Highlights and key features of the study

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Global Model Based Development (MBD) total market, 2021-2032, (USD Million)

Global Model Based Development (MBD) total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Model Based Development (MBD) total market, key domestic companies, and share, (USD Million)

Global Model Based Development (MBD) revenue by player, revenue and market share 2021-2026, (USD Million)

Global Model Based Development (MBD) total market by Type, CAGR, 2021-2032, (USD Million)

Global Model Based Development (MBD) total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Model Based Development (MBD) market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Siemens, IBM, dSPACE, Zuken, Maplesoft, Renesas Electronics, Collimator, Synopsys, Embitel, ALTEN Global, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Model Based Development (MBD) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

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Global Model Based Development (MBD) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Model Based Development (MBD) Market, Segmentation by Type:

Software

Service

Global Model Based Development (MBD) Market, Segmentation by Deployment Method:

Cloud Based

On-premises

Global Model Based Development (MBD) Market, Segmentation by

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Organization Size:

Large Enterprises

SMEs

Global Model Based Development (MBD) Market, Segmentation by Application:

Automotive

Electronics and Semiconductor

Aerospace and Defence

Medical

Industrial

Others

Companies Profiled:

Siemens

IBM

dSPACE

Zuken

Maplesoft

Renesas Electronics

Collimator

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Synopsys

Embitel

ALTEN Global

Array of Engineers

Spyrosoft

ITPower Solutions

Model Engineering Solutions

SANEI HYTECHS

LHP

IAST Software Solutions

MathWorks

ETAS

AVL

INNOTECH

BTC Embedded Systems

Key Questions Answered

1. How big is the global Model Based Development (MBD) market?
2. What is the demand of the global Model Based Development (MBD) market?
3. What is the year over year growth of the global Model Based Development (MBD) market?
4. What is the total value of the global Model Based Development (MBD) market?

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5. Who are the Major Players in the global Model Based Development (MBD) market?
6. What are the growth factors driving the market demand?

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