

EDA Tools for Digital IC Design Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

<https://marketpublishers.com/r/E57D358F9273EN.html>

Date: February 2025

Pages: 123

Price: US\$ 3,200.00 (Single User License)

ID: E57D358F9273EN

Abstracts

EDA Tools for Digital IC Design Market Overview

The Electronic Design Automation (EDA) tools market for digital IC design is poised for significant growth from 2025 to 2030. EDA tools are essential for designing and verifying complex digital integrated circuits (ICs), enabling faster time-to-market and improved performance. The market is driven by advancements in semiconductor technology, increasing demand for consumer electronics, and the proliferation of IoT devices. The global EDA tools market for digital IC design is projected to grow at a CAGR of 8.5%-10% during the forecast period, reaching a market size of \$12.5 billion to \$14 billion by 2030.

Market Size and Share Analysis

The EDA tools market for digital IC design is segmented by product type, process, application, end-use, and region. In 2025, the market is estimated to be valued at \$9.2 billion, with the digital IC frontend (FE) design segment holding a dominant share of 55%-60%. The digital IC backend (BE) design segment is expected to grow at a faster rate, driven by the increasing complexity of IC designs and the need for advanced verification tools.

By Product Type

Digital IC Frontend (FE) Design: This segment includes tools for logic synthesis, simulation, and verification. It accounts for the largest market share, driven by the demand for high-performance computing and AI chips.

Digital IC Backend (BE) Design: This segment focuses on physical design, layout, and sign-off tools. It is expected to grow at a CAGR of 9%-11% due to the increasing complexity of advanced nodes (5nm, 3nm, and below).

By Key Players

The market is highly competitive, with key players including:

Siemens EDA: Holds a market share of 18%-20%, focusing on comprehensive design and verification solutions.

Synopsys (Ansys): Accounts for 22%-25% of the market, leading in AI-driven design tools and IP solutions.

Cadence: Captures 20%-23% of the market, known for its innovative digital design and verification platforms.

Silvaco: Specializes in analog and mixed-signal design tools, holding a 5%-7% market share.

MunEDA: Focuses on optimization tools, with a niche market share of 2%-3%.

Other Players: Agnisys, Excellicon, Emphyrean Technology, Xpeedic Technology, Semitronix, Faraday Dynamics, Ltd., MircoScape Technology Co., Ltd, Primarius Technologies, Arcas-tech Co., Ltd., Shanghai UniVista Industrial Software Group, Shanghai LEDA Technology, Phlexing Technology, Robei, HyperSilicon Co., Ltd, S2C Limited, X-EPIC, Huaxin Jushu, and ValiantSec collectively account for 25%-30% of the market.

By Process

The market is segmented by process nodes, including:

Advanced Nodes (5nm, 3nm, and below): Expected to grow at a CAGR of 10%-12%, driven by demand for high-performance computing and AI applications.

Mature Nodes (28nm and above): Continues to hold a significant share, particularly in automotive and industrial applications, growing at a CAGR of 6%-8%.

By Application

The key applications of EDA tools for digital IC design include:

Automotive: Accounts for 15%-18% of the market, driven by the adoption of electric vehicles (EVs) and advanced driver-assistance systems (ADAS).

IT and Telecommunications: Represents 25%-28% of the market, fueled by the rollout of 5G networks and data center expansion.

Industrial Automation: Holds a 12%-15% share, supported by the growth of Industry 4.0 and smart manufacturing.

Consumer Electronics: The largest application segment, accounting for 30%-35%, driven by demand for smartphones, wearables, and IoT devices.

Healthcare Devices: Growing at a CAGR of 7%-9%, supported by advancements in medical electronics and wearable health monitors.

Others: Includes aerospace, defense, and energy applications, contributing 5%-7% to the market.

By End-Use

The end-use segments include:

IDMs (Integrated Device Manufacturers): Hold a 40%-45% share, driven by in-house design capabilities.

Fabless Companies: Account for 35%-40%, leveraging EDA tools for cost-effective design solutions.

Foundries: Represent 15%-20%, focusing on design enablement and process optimization.

By Region

The market is analyzed across key regions:

North America: Dominates with a 35%-40% share, driven by the presence of major semiconductor companies and R&D investments.

Asia-Pacific: Expected to grow at the highest CAGR of 10%-12%, supported by the expansion of the semiconductor industry in China, Taiwan, and South Korea.

Europe: Holds a 20%-25% share, driven by automotive and industrial applications.

Rest of the World: Accounts for 10%-15%, with growth in emerging markets such as Latin America and the Middle East.

Market Trends and Drivers

The EDA tools market for digital IC design is influenced by several key trends:

AI and Machine Learning Integration: AI-driven EDA tools are gaining traction, enabling

faster design optimization and verification.

Shift to Advanced Nodes: The transition to 5nm, 3nm, and below is driving demand for advanced EDA tools.

Rising Demand for Custom ICs: The need for application-specific ICs in automotive, IoT, and AI is boosting market growth.

Cloud-Based EDA Solutions: Increasing adoption of cloud-based tools for collaborative design and scalability.

Market Challenges

Despite the growth prospects, the market faces challenges such as:

High Development Costs: The cost of developing advanced EDA tools is a barrier for smaller players.

Skill Shortage: The lack of skilled professionals in IC design and verification is a concern.

Geopolitical Risks: Trade tensions and export restrictions can impact the supply chain.

Market News on Policy and Companies

Recent developments in the EDA tools market include:

Policy Changes: Governments worldwide are investing in semiconductor self-sufficiency, with initiatives such as the U.S. CHIPS Act and the European Chips Act driving demand for EDA tools.

Company Collaborations: Synopsys and Cadence have partnered with leading foundries to develop EDA solutions for advanced nodes.

Mergers and Acquisitions: Siemens EDA acquired Solido Design Automation to strengthen its position in variation-aware design tools.

Segment Forecasts (2025-2030)

The EDA tools market for digital IC design is expected to witness robust growth across all segments:

Digital IC Frontend Design: Projected to grow at a CAGR of 8%-10%.

Digital IC Backend Design: Expected to grow at a CAGR of 9%-11%.

Automotive Applications: Anticipated to grow at a CAGR of 10%-12%.

Asia-Pacific Region: Forecasted to grow at a CAGR of 10%-12%.

Conclusion

The EDA tools market for digital IC design is set for significant growth from 2025 to 2030, driven by advancements in semiconductor technology, increasing demand for consumer electronics, and the proliferation of IoT devices. Key players such as Siemens EDA, Synopsys, and Cadence are leading the market, with a focus on AI-driven tools and advanced node solutions. Despite challenges such as high development costs and skill shortages, the market is expected to thrive, supported by favorable policies and increasing investments in semiconductor R&D.

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