

Photonic Design Automation Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Component (Solution and Service), Deployment (On-Premise and Cloud), Organization Size (SMEs and Large Enterprises), and Application (Academic Research and Industrial Research & Manufacturing)

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Abstracts

The Photonic design automation market size was valued at US\$ 1.39 billion in 2022 and is expected to reach US\$ 3.90 billion by 2030; it is estimated to record a CAGR of 13.8% from 2022 to 2030.

The integration of photonics into electronic design automation (EDA) tools is a significant trend in the photonic design automation market. Established EDA vendors recognize the potential of the emerging photonic design automation market and incorporate photonics-specific features and capabilities into their existing tools. This integration enables designers to seamlessly incorporate photonics components into their designs, streamlining the design process and optimizing the performance and functionality of photonic devices. By integrating photonics into EDA tools, designers can leverage familiar design environments and workflows, reducing the learning curve associated with specialized photonic design tools. The integration of photonics into EDA tools also facilitates the convergence of electronics and photonics, enabling the development of integrated electronic-photonic circuits. This convergence is crucial for the advancement of technologies such as silicon photonics, where the sharing of tools, processes, and simulation models between photonics and IC design accelerates the

development of photonic design automation market. Overall, the integration of photonics into EDA tools reflects the industry's recognition of the growing importance of photonics and the need for efficient design processes and optimization techniques in the photonic field. It enables designers to harness the potential of photonics and seamlessly incorporate it into their electronic designs.

Advancements in compact modeling and simulation tools are expected to have a significant impact on the photonic design automation market. These tools play a crucial role in the convergence of electronics and photonics, enabling faster and more efficient design processes. Compact modeling refers to the development of simplified mathematical models that precisely denote the behavior of complex photonic devices. These models allow designers to simulate and analyze the performance of photonic components without the need for expensive and time-consuming device-level simulations. By incorporating compact modeling into design automation tools, designers can streamline the design process and optimize the performance of integrated electronic-photonic circuits. These tools facilitate the transition from electronic-photonic co-design to the development of fully integrated circuits, enabling designers to achieve high performance and efficiency. Such advantages enable higher applications and promote photonic design automation market growth.

The integration of compact modeling and simulation tools into the photonic design automation workflow enables designers to explore different design options, evaluate the impact of various parameters, and make informed decisions. This leads to faster design iterations, reduced time-to-market, and improved overall design quality. The importance of compact modeling and simulation tools offered by photonic design automation market players is recognized by both industry and academia. Established electronic design automation vendors are incorporating photonics-specific features and capabilities into their existing tools, allowing designers to integrate photonics components into their designs seamlessly.

The solution segment of the photonic design automation market encompasses a variety of software and tools that facilitate the design, simulation, and verification of photonic integrated circuits (PICs) and other photonic devices. These solutions are purpose-built to address the distinctive challenges and needs of the photonics industry. Photonic design automation (PDA) tools are instrumental in expediting the development and enhancement of photonic devices by equipping designers with advanced capabilities for simulation, modeling, and analysis. These tools enable designers to effectively create and validate intricate photonic circuits, optimize performance, and ensure efficient production processes. Software tools that enable designers to create and lay out

photonic circuits have components such as waveguides, modulators, detectors, and filters. These tools often provide a user-friendly interface and advanced design capabilities to streamline the design process. The photonic design automation market growth is driven by the growing demand for photonic devices in various applications, including telecommunications, data centers, healthcare, sensing, and imaging. As the photonics industry continues to evolve and expand, the need for efficient and reliable design tools becomes increasingly important.

The academic research segment of the photonic design automation market refers to the involvement of universities, research institutions, and academic professionals in conducting research and development activities related to photonic design and associated services. This segment plays a crucial role in advancing the field of photonics and driving innovation in design methodologies, algorithms, and tools. Academic institutions and research organizations actively engage in research and development activities to explore new concepts, algorithms, and techniques. They thus avail the different solutions offered by photonic design automation market players. They focus on developing innovative solutions to address the challenges and limitations in the design of photonic components, systems, and integrated circuits, by utilizing such solutions. This research contributes to the advancement of the field and provides valuable insights for industry practitioners. Academic researchers often collaborate with industry experts, other academic institutions, and research consortia to share knowledge, exchange ideas, and collaborate on joint research projects. These collaborations foster interdisciplinary approaches and enable the integration of diverse perspectives in photonic design automation. The academic research segment plays a vital role in facilitating collaboration and knowledge sharing within the photonics industry. For instance, the University of Texas Design Automation Laboratory (UTDA) focuses on the R&D of design automation algorithms, methodologies, and tools for optics/photonics, electronics, and emerging technologies in the photonic design automation market.

Industrial research and manufacturing companies develop and utilize design automation tools specifically tailored for the photonics industry. These tools enable designers to automate various stages of the design process, such as layout generation, simulation, verification, and optimization. By leveraging these tools, companies can accelerate the design cycle, improve design quality, and reduce time-to-market for photonic products. The industrial research and manufacturing segment focuses on optimizing the manufacturing processes for photonic devices. This includes developing advanced fabrication techniques, process control methodologies, and yield enhancement strategies. By improving manufacturing efficiency and yield rates, companies can

achieve cost-effective production of high-quality photonic components and systems. Photonic design automation market players often collaborate with photonic manufacturers to enhance and promote their products. For instance, in March 2022, Cadence Design Systems collaborated with GlobalFoundries for accelerating silicon photonics IC development for hyperscale computing, 5G communications, and aerospace systems among others. Such collaborations greatly enhance the awareness regarding such products, and also promote photonic design automation market growth.

The global photonic design automation market is segmented based on component, deployment, organization size, and application. Based on component, the photonic design automation market is divided into solutions and services. In terms of deployment, the photonic design automation market is bifurcated into on-premise and cloud. By organization size, the photonic design automation market is bifurcated into SMEs and large enterprises. Based on application, the photonic design automation market is divided into academic research and industrial research & manufacturing. By geography, the photonic design automation market is segmented into North America, Europe, Asia Pacific (APAC), and Rest of the World (RoW). AIM Photonics Inc, Ansys Inc, Cadence Design Systems Inc, LioniX International BV, Luceda Photonics, Optiwave Systems Inc, Siemens AG, Synopsys Inc, SystemLab Inc, and VPIphotonics GmbH are among the prominent photonic design automation market players.

Contents

1. INTRODUCTION

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. PHOTONIC DESIGN AUTOMATION MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 List of Vendors in the Value Chain:

5. PHOTONIC DESIGN AUTOMATION MARKET - KEY MARKET DYNAMICS

- 5.1 Photonic Design Automation Market - Key Market Dynamics
- 5.2 Market Drivers
 - 5.2.1 Growing Demand for Automation
 - 5.2.2 Increasing Need for Efficiency and Accuracy
- 5.3 Market Restraints
 - 5.3.1 Lack of Awareness Regarding Benefits and Capabilities of Photonic Design Automation
- 5.4 Market Opportunities
 - 5.4.1 Advancements in Photonic Devices
 - 5.4.2 Emphasis on High Performance and Environmentally Sustainable Solutions
- 5.5 Future Trends
 - 5.5.1 Integration of Photonics in Electronic Design Automation (EDA) Tools

5.5.2 Advancements in Compact Modelling and Simulation Tools
5.6 Impact of Drivers and Restraints:

6. PHOTONIC DESIGN AUTOMATION MARKET - GLOBAL MARKET ANALYSIS

6.1 Photonic Design Automation Market Revenue (US\$ Million), 2022 – 2030
6.2 Photonic Design Automation Market Forecast and Analysis

7. PHOTONIC DESIGN AUTOMATION MARKET ANALYSIS - COMPONENT

7.1 Solution
7.1.1 Overview
7.1.2 Solution Market, Revenue and Forecast to 2030 (US\$ Million)
7.2 Service
7.2.1 Overview
7.2.2 Service Market, Revenue and Forecast to 2030 (US\$ Million)

8. PHOTONIC DESIGN AUTOMATION MARKET ANALYSIS - DEPLOYMENT

8.1 On-Premise
8.1.1 Overview
8.1.2 On-Premise Market, Revenue and Forecast to 2030 (US\$ Million)
8.2 Cloud
8.2.1 Overview
8.2.2 Cloud Market, Revenue and Forecast to 2030 (US\$ Million)

9. PHOTONIC DESIGN AUTOMATION MARKET ANALYSIS - ORGANIZATION SIZE

9.1 SMEs
9.1.1 Overview
9.1.2 SMEs Market, Revenue and Forecast to 2030 (US\$ Million)
9.2 Large Enterprises
9.2.1 Overview
9.2.2 Large Enterprises Market, Revenue and Forecast to 2030 (US\$ Million)

10. PHOTONIC DESIGN AUTOMATION MARKET ANALYSIS - APPLICATION

10.1 Academic Research
10.1.1 Overview

10.1.2 Academic Research Market, Revenue and Forecast to 2030 (US\$ Million)

10.2 Industrial Research & Manufacturing

10.2.1 Overview

10.2.2 Industrial Research & Manufacturing Market, Revenue and Forecast to 2030 (US\$ Million)

11. PHOTONIC DESIGN AUTOMATION MARKET - GEOGRAPHICAL ANALYSIS

11.1 Overview

11.2 North America

11.2.1 North America Photonic Design Automation Market Overview

11.2.2 North America Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.2.3 North America Photonic Design Automation Market Breakdown by Component

11.2.3.1 North America Photonic Design Automation Market Revenue and Forecasts and Analysis - By Component

11.2.4 North America Photonic Design Automation Market Breakdown by Deployment

11.2.4.1 North America Photonic Design Automation Market Revenue and Forecasts and Analysis - By Deployment

11.2.5 North America Photonic Design Automation Market Breakdown by Organization Size

11.2.5.1 North America Photonic Design Automation Market Revenue and Forecasts and Analysis - By Organization Size

11.2.6 North America Photonic Design Automation Market Breakdown by Application

11.2.6.1 North America Photonic Design Automation Market Revenue and Forecasts and Analysis - By Application

11.2.7 North America Photonic Design Automation Market Revenue and Forecasts and Analysis - By Country

11.2.7.1 North America Photonic Design Automation Market Revenue and Forecasts and Analysis - By Country

11.2.7.2 US Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.2.7.2.1 US Photonic Design Automation Market Breakdown, by Component

11.2.7.2.2 US Photonic Design Automation Market Breakdown, by Deployment

11.2.7.2.3 US Photonic Design Automation Market Breakdown, by Organization Size

11.2.7.2.4 US Photonic Design Automation Market Breakdown, by Application

11.2.7.3 Canada Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

- 11.2.7.3.1 Canada Photonic Design Automation Market Breakdown, by Component
- 11.2.7.3.2 Canada Photonic Design Automation Market Breakdown, by Deployment
- 11.2.7.3.3 Canada Photonic Design Automation Market Breakdown, by Organization Size
- 11.2.7.3.4 Canada Photonic Design Automation Market Breakdown, by Application
- 11.3 Europe
 - 11.3.1 Europe Photonic Design Automation Market Overview
 - 11.3.2 Europe Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)
 - 11.3.3 Europe Photonic Design Automation Market Breakdown by Component
 - 11.3.3.1 Europe Photonic Design Automation Market Revenue and Forecasts and Analysis - By Component
 - 11.3.4 Europe Photonic Design Automation Market Breakdown by Deployment
 - 11.3.4.1 Europe Photonic Design Automation Market Revenue and Forecasts and Analysis - By Deployment
 - 11.3.5 Europe Photonic Design Automation Market Breakdown by Organization Size
 - 11.3.5.1 Europe Photonic Design Automation Market Revenue and Forecasts and Analysis - By Organization Size
 - 11.3.6 Europe Photonic Design Automation Market Breakdown by Application
 - 11.3.6.1 Europe Photonic Design Automation Market Revenue and Forecasts and Analysis - By Application
 - 11.3.7 Europe Photonic Design Automation Market Revenue and Forecasts and Analysis - By Country
 - 11.3.7.1 Europe Photonic Design Automation Market Revenue and Forecasts and Analysis - By Country
 - 11.3.7.2 Germany Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)
 - 11.3.7.2.1 Germany Photonic Design Automation Market Breakdown, by Component
 - 11.3.7.2.2 Germany Photonic Design Automation Market Breakdown, by Deployment
 - 11.3.7.2.3 Germany Photonic Design Automation Market Breakdown, by Organization Size
 - 11.3.7.2.4 Germany Photonic Design Automation Market Breakdown, by Application
 - 11.3.7.3 France Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)
 - 11.3.7.3.1 France Photonic Design Automation Market Breakdown, by Component
 - 11.3.7.3.2 France Photonic Design Automation Market Breakdown, by Deployment
 - 11.3.7.3.3 France Photonic Design Automation Market Breakdown, by Organization

Size

11.3.7.3.4 France Photonic Design Automation Market Breakdown, by Application

11.3.7.4 UK Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.3.7.4.1 UK Photonic Design Automation Market Breakdown, by Component

11.3.7.4.2 UK Photonic Design Automation Market Breakdown, by Deployment

11.3.7.4.3 UK Photonic Design Automation Market Breakdown, by Organization

Size

11.3.7.4.4 UK Photonic Design Automation Market Breakdown, by Application

11.3.7.5 Russia Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.3.7.5.1 Russia Photonic Design Automation Market Breakdown, by Component

11.3.7.5.2 Russia Photonic Design Automation Market Breakdown, by Deployment

11.3.7.5.3 Russia Photonic Design Automation Market Breakdown, by Organization

Size

11.3.7.5.4 Russia Photonic Design Automation Market Breakdown, by Application

11.3.7.6 Switzerland Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.3.7.6.1 Switzerland Photonic Design Automation Market Breakdown, by Component

11.3.7.6.2 Switzerland Photonic Design Automation Market Breakdown, by Deployment

11.3.7.6.3 Switzerland Photonic Design Automation Market Breakdown, by Organization Size

11.3.7.6.4 Switzerland Photonic Design Automation Market Breakdown, by Application

11.3.7.7 Rest of Europe Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.3.7.7.1 Rest of Europe Photonic Design Automation Market Breakdown, by Component

11.3.7.7.2 Rest of Europe Photonic Design Automation Market Breakdown, by Deployment

11.3.7.7.3 Rest of Europe Photonic Design Automation Market Breakdown, by Organization Size

11.3.7.7.4 Rest of Europe Photonic Design Automation Market Breakdown, by Application

11.4 APAC

11.4.1 APAC Photonic Design Automation Market Overview

11.4.2 APAC Photonic Design Automation Market Revenue and Forecasts to 2030

(US\$ Mn)

11.4.3 APAC Photonic Design Automation Market Breakdown by Component

11.4.3.1 APAC Photonic Design Automation Market Revenue and Forecasts and Analysis - By Component

11.4.4 APAC Photonic Design Automation Market Breakdown by Deployment

11.4.4.1 APAC Photonic Design Automation Market Revenue and Forecasts and Analysis - By Deployment

11.4.5 APAC Photonic Design Automation Market Breakdown by Organization Size

11.4.5.1 APAC Photonic Design Automation Market Revenue and Forecasts and Analysis - By Organization Size

11.4.6 APAC Photonic Design Automation Market Breakdown by Application

11.4.6.1 APAC Photonic Design Automation Market Revenue and Forecasts and Analysis - By Application

11.4.7 APAC Photonic Design Automation Market Revenue and Forecasts and Analysis - By Country

11.4.7.1 APAC Photonic Design Automation Market Revenue and Forecasts and Analysis - By Country

11.4.7.2 China Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.4.7.2.1 China Photonic Design Automation Market Breakdown, by Component

11.4.7.2.2 China Photonic Design Automation Market Breakdown, by Deployment

11.4.7.2.3 China Photonic Design Automation Market Breakdown, by Organization Size

11.4.7.2.4 China Photonic Design Automation Market Breakdown, by Application

11.4.7.3 Japan Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.4.7.3.1 Japan Photonic Design Automation Market Breakdown, by Component

11.4.7.3.2 Japan Photonic Design Automation Market Breakdown, by Deployment

11.4.7.3.3 Japan Photonic Design Automation Market Breakdown, by Organization Size

11.4.7.3.4 Japan Photonic Design Automation Market Breakdown, by Application

11.4.7.4 South Korea Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.4.7.4.1 South Korea Photonic Design Automation Market Breakdown, by Component

11.4.7.4.2 South Korea Photonic Design Automation Market Breakdown, by Deployment

11.4.7.4.3 South Korea Photonic Design Automation Market Breakdown, by Organization Size

- 11.4.7.4.4 South Korea Photonic Design Automation Market Breakdown, by Application
- 11.4.7.5 Taiwan Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)
 - 11.4.7.5.1 Taiwan Photonic Design Automation Market Breakdown, by Component
 - 11.4.7.5.2 Taiwan Photonic Design Automation Market Breakdown, by Deployment
 - 11.4.7.5.3 Taiwan Photonic Design Automation Market Breakdown, by Organization Size
 - 11.4.7.5.4 Taiwan Photonic Design Automation Market Breakdown, by Application
- 11.4.7.6 Rest of APAC Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)
 - 11.4.7.6.1 Rest of APAC Photonic Design Automation Market Breakdown, by Component
 - 11.4.7.6.2 Rest of APAC Photonic Design Automation Market Breakdown, by Deployment
 - 11.4.7.6.3 Rest of APAC Photonic Design Automation Market Breakdown, by Organization Size
 - 11.4.7.6.4 Rest of APAC Photonic Design Automation Market Breakdown, by Application
- 11.5 Rest of the World (RoW)
 - 11.5.1 RoW Photonic Design Automation Market Overview
 - 11.5.2 RoW Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)
 - 11.5.3 RoW Photonic Design Automation Market Breakdown by Component
 - 11.5.3.1 RoW Photonic Design Automation Market Revenue and Forecasts and Analysis - By Component
 - 11.5.4 RoW Photonic Design Automation Market Breakdown by Deployment
 - 11.5.4.1 RoW Photonic Design Automation Market Revenue and Forecasts and Analysis - By Deployment
 - 11.5.5 RoW Photonic Design Automation Market Breakdown by Organization Size
 - 11.5.5.1 RoW Photonic Design Automation Market Revenue and Forecasts and Analysis - By Organization Size
 - 11.5.6 RoW Photonic Design Automation Market Breakdown by Application
 - 11.5.6.1 RoW Photonic Design Automation Market Revenue and Forecasts and Analysis - By Application
 - 11.5.7 RoW Photonic Design Automation Market Revenue and Forecasts and Analysis - By Region
 - 11.5.7.1 RoW Photonic Design Automation Market Revenue and Forecasts and Analysis - By Region

11.5.7.2 MEA Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.5.7.2.1 MEA Photonic Design Automation Market Breakdown, by Component

11.5.7.2.2 MEA Photonic Design Automation Market Breakdown, by Deployment

11.5.7.2.3 MEA Photonic Design Automation Market Breakdown, by Organization Size

11.5.7.2.4 MEA Photonic Design Automation Market Breakdown, by Application

11.5.7.3 SAM Photonic Design Automation Market Revenue and Forecasts to 2030 (US\$ Mn)

11.5.7.3.1 SAM Photonic Design Automation Market Breakdown, by Component

11.5.7.3.2 SAM Photonic Design Automation Market Breakdown, by Deployment

11.5.7.3.3 SAM Photonic Design Automation Market Breakdown, by Organization Size

11.5.7.3.4 SAM Photonic Design Automation Market Breakdown, by Application

12. PHOTONIC DESIGN AUTOMATION MARKET – IMPACT OF COVID-19 PANDEMIC

12.1 Pre & Post Covid-19 Impact

13. COMPETITIVE LANDSCAPE

13.1 Heat Map Analysis By Key Players

13.2 Company Positioning & Concentration

14. INDUSTRY LANDSCAPE

14.1 Overview

14.2 Market Initiative

14.2 New Product Development

14.3 Merger and Acquisition

15. COMPANY PROFILES

15.1 Ansys Inc

15.1.1 Key Facts

15.1.2 Business Description

15.1.3 Products and Services

15.1.4 Financial Overview

- 15.1.5 SWOT Analysis
- 15.1.6 Key Developments
- 15.2 LioniX International BV
 - 15.2.1 Key Facts
 - 15.2.2 Business Description
 - 15.2.3 Products and Services
 - 15.2.4 Financial Overview
 - 15.2.5 SWOT Analysis
 - 15.2.6 Key Developments
- 15.3 VPIphotonics GmbH
 - 15.3.1 Key Facts
 - 15.3.2 Business Description
 - 15.3.3 Products and Services
 - 15.3.4 Financial Overview
 - 15.3.5 SWOT Analysis
 - 15.3.6 Key Developments
- 15.4 Optiwave Systems Inc
 - 15.4.1 Key Facts
 - 15.4.2 Business Description
 - 15.4.3 Products and Services
 - 15.4.4 Financial Overview
 - 15.4.5 SWOT Analysis
 - 15.4.6 Key Developments
- 15.5 Luceda Photonics
 - 15.5.1 Key Facts
 - 15.5.2 Business Description
 - 15.5.3 Products and Services
 - 15.5.4 Financial Overview
 - 15.5.5 SWOT Analysis
 - 15.5.6 Key Developments
- 15.6 Cadence Design Systems Inc
 - 15.6.1 Key Facts
 - 15.6.2 Business Description
 - 15.6.3 Products and Services
 - 15.6.4 Financial Overview
 - 15.6.5 SWOT Analysis
 - 15.6.6 Key Developments
- 15.7 Siemens AG
 - 15.7.1 Key Facts

- 15.7.2 Business Description
- 15.7.3 Products and Services
- 15.7.4 Financial Overview
- 15.7.5 SWOT Analysis
- 15.7.6 Key Developments
- 15.8 Synopsys Inc
 - 15.8.1 Key Facts
 - 15.8.2 Business Description
 - 15.8.3 Products and Services
 - 15.8.4 Financial Overview
 - 15.8.5 SWOT Analysis
 - 15.8.6 Key Developments
- 15.9 AIM Photonics Inc
 - 15.9.1 Key Facts
 - 15.9.2 Business Description
 - 15.9.3 Products and Services
 - 15.9.4 Financial Overview
 - 15.9.5 SWOT Analysis
 - 15.9.6 Key Developments
- 15.10 SystemLab Inc
 - 15.10.1 Key Facts
 - 15.10.2 Business Description
 - 15.10.3 Products and Services
 - 15.10.4 Financial Overview
 - 15.10.5 SWOT Analysis
 - 15.10.6 Key Developments

16. APPENDIX

- 16.1 Word Index

List Of Tables

LIST OF TABLES

Table 1. Photonic Design Automation Market Segmentation

Table 2. Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Million)

Table 3. Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Million) – Component

Table 4. Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Million) – Deployment

Table 5. Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Million) – Organization Size

Table 6. Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Million) – Application

Table 7. North America Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 8. North America Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 9. North America Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 10. North America Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 11. North America Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Country

Table 12. US Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 13. US Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 14. US Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 15. US Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 16. Canada Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 17. Canada Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 18. Canada Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 19. Canada Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 20. Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 21. Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 22. Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 23. Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 24. Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Country

Table 25. Germany Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 26. Germany Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 27. Germany Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 28. Germany Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 29. France Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 30. France Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 31. France Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 32. France Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 33. UK Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 34. UK Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 35. UK Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 36. UK Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 37. Russia Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 38. Russia Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Deployment

Table 39. Russia Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Organization Size

Table 40. Russia Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Application

Table 41. Switzerland Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 42. Switzerland Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 43. Switzerland Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 44. Switzerland Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 45. Rest of Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 46. Rest of Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 47. Rest of Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 48. Rest of Europe Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 49. APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 50. APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 51. APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 52. APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 53. APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Country

Table 54. China Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 55. China Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 56. China Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 57. China Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 58. Japan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 59. Japan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 60. Japan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 61. Japan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 62. South Korea Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 63. South Korea Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 64. South Korea Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 65. South Korea Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 66. Taiwan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 67. Taiwan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 68. Taiwan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 69. Taiwan Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 70. Rest of APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 71. Rest of APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 72. Rest of APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 73. Rest of APAC Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Application

Table 74. RoW Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 75. RoW Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 76. RoW Photonic Design Automation Market Revenue and Forecasts To 2030 (US\$ Mn) – By Organization Size

Table 77. RoW Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Application

Table 78. RoW Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Region

Table 79. MEA Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Component

Table 80. MEA Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Deployment

Table 81. MEA Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Organization Size

Table 82. MEA Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Application

Table 83. SAM Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Component

Table 84. SAM Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Deployment

Table 85. SAM Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Organization Size

Table 86. SAM Photonic Design Automation Market Revenue and Forecasts To 2030

(US\$ Mn) – By Application

Table 87. Heat Map Analysis By Key Players

Table 88. List of Abbreviation

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