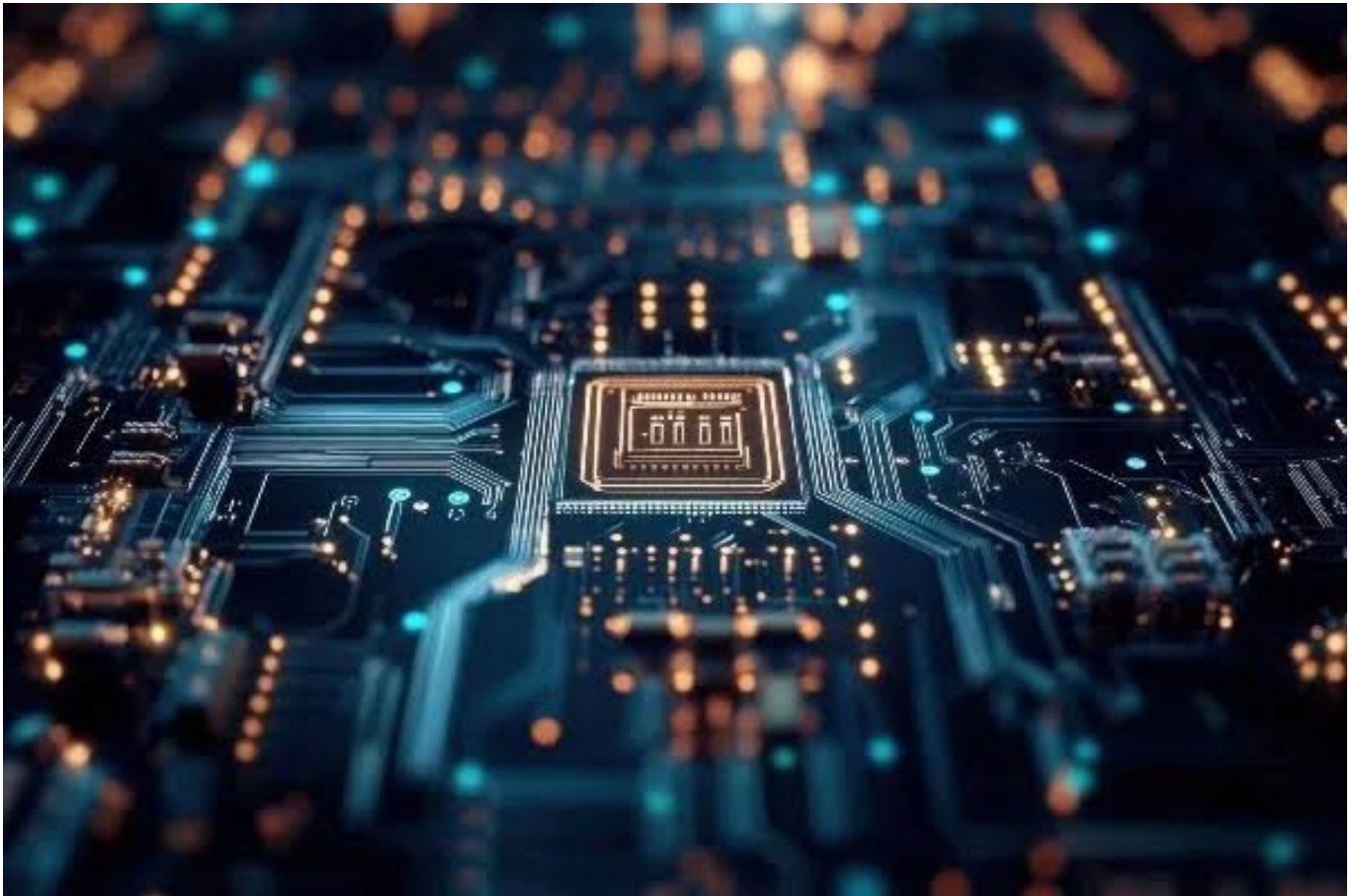


NEWS | TECHNOLOGY

Electronic System Design Industry Revenue Rises 10.3% to \$5.47 Billion in Q4 2025

SEMI ESD Alliance data shows strong growth across semiconductor IP, services and CAE, while Americas and APAC lead regional gains in the electronic design market.

By **Ankit Kankar** | September 12, 2026



Picture Courtesy | Public Domain

Electronic System Design (ESD) industry revenue increased 10.3% to \$5,466.3 million in the fourth quarter of 2025 from the \$4,955.2 million registered in the fourth quarter of 2024, the [ESD Alliance](#), a SEMI Technology Community, announced in its latest [Electronic Design Market Data \(EDMD\) report](#) . The four-quarter moving average rose 10.1%, based on a comparison of the most recent four quarters to the prior four.

"The electronic design automation (EDA) industry continues to report strong year-over-year revenue growth in Q4 2025," said Walden C. Rhines, Executive Sponsor of the SEMI Electronic Design Market Data report. "Product categories CAE, PCB and MCM, Semiconductor IP (SIP), and Services all reported gains. Geographic regions, including Americas, EMEA, and APAC, reported growth in Q4, with a double-digit increase in Americas and APAC."

The companies tracked in the *EDMD* report employed 71,517 people globally in Q4 2025, a 13.8% increase over the Q4 2024 headcount of 62,833, but down 2.3% compared to Q3 2025.

The quarterly *EDMD* report contains detailed revenue information within the following categories and geographic breakdowns.

Revenue by Product and Application Category - Year-Over-Year Change

- **Computer-Aided Engineering (CAE)** revenue increased 5.0% to \$1,887.4 million. The four-quarter CAE moving average increased 5.6%.
- **IC Physical Design and Verification** revenue decreased 2.6% to \$777.2 million. The four-quarter moving average for the category decreased 5.1%.
- **Printed Circuit Board and Multi-Chip Module (PCB and MCM)** revenue rose 1.8% to \$484.6 million. The four-quarter moving average for PCB and MCM rose 4.5%.
- **Semiconductor Intellectual Property (SIP)** revenue increased 18.3% to \$2,083.2 million. The four-quarter SIP moving average rose 17.4%.
- **Services** revenue increased 19.6% to \$233.9 million. The four-quarter Services moving average rose 15.6%.

Revenue by Region - Year-Over-Year Change

- The **Americas**, the largest reporting region by revenue, procured \$2,473.5 million of electronic system design products and services in Q4 2025, a 13.9% increase. The four-quarter moving average for the Americas rose 10.6%.
- **Europe, the Middle East, and Africa (EMEA)** procured \$683.4 million of electronic system design products and services in Q4 2025, a 9.8% increase. The four-quarter moving average for EMEA grew 9.4%.
- **Japan's** procurement of electronic system design products and services decreased 18.8% to \$258.5 million in Q4 2025. The four-quarter moving average for Japan decreased 7.4%.
- **Asia Pacific (APAC)** procured \$2,050.8 million of electronic system design products and services in Q4 2025, an 11.3% increase. The four-quarter moving average for APAC grew 12.6%.

Read online: <https://worldbusinesswatch.com/news/13/23/electronic-system-design-industry-revenue-rises-10-3-to-5-47-billion-in-q4-2025.html>

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