

2023 PLM Market Results

2024 Market & Industry Forum—27 March 2024

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2023 PLM Market Results
PLM Market & Industry Forum
A CIMdata PLM Leadership Event

27 March 2024—Ann Arbor, MI USA

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Strategic management consulting for competitive advantage in global markets

The leading independent authority on PLM and its digital transformation. We provide research, education, and strategic consulting to clients around the world.

OUR MISSION:
Maximizing clients' ability to design, acquire, deliver, and support innovative products and services.

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Purpose of this Presentation



A CIMdata disclaimer

- Deliver an overview of CIMdata's analysis of the PLM market for calendar year 2023
- Present our estimates of direct provider revenues by various categories
- Provide insight into investment changes, trends and market leaders
- A detailed analysis of this research will be provided in CIMdata's 2024 PLM Market Analysis Report series
- All information represent CIMdata's estimates of revenues and investments

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Important Notes



How CIMdata prepares the global MAR data

- CIMdata's estimates are for calendar year 2023 and may differ from a provider's fiscal year reported financials
- The relative strength of different currencies can impact growth estimates – all estimates are based on the yearly average for conversion of currency
- All estimates are net of royalties to eliminate any double counting of revenues
 - The royalty paid by a reseller is deducted from their revenue estimate and included within the direct revenues of the appropriate provider's estimate
- There are many acquisitions that could affect some numbers
 - We will note those during the presentation

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- PLM Market Analysis
- Overall cPDM Market Analysis
- PLM Provider Analysis
- Provider Sector Analysis
- Concluding Remarks

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Research Methodology Overview

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How CIMdata gathers PLM market data each year

- Gather data through multiple means
 - Historically, ~350 companies get survey workbooks via email
 - Repeated reminders increase response rate
 - Approximately 30 of the world's largest PLM companies interviewed each year
 - Often multiple times to get more insights
 - Separate research conducted in China and Japan
 - Public reporting and other market research used for data collection and cross-check, e.g., Electronic System Design Alliance (formerly EDA Consortium)
 - CIMdata global contacts used as "sanity checks" on anomalous inputs
- Total of approximately 500 companies "touched" by CIMdata process

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Currency Fluctuations Important



Revenues most often reported in USD, Euros, and Japanese Yen

Currency	2021	2022	2023	Currency	2021	2022	2023
\$	1.000	1.000	1.000	\$	0.00%	0.00%	0.00%
Australian Dollar	0.751	0.693	0.664	Australian Dollar	9.20%	-7.66%	-4.19%
Brazilian Real	0.186	0.194	0.200	Brazilian Real	3.43%	4.20%	3.21%
Chinese Yuan	0.155	0.149	0.141	Chinese Yuan	6.89%	-3.99%	-5.07%
Euro	1.183	1.052	1.081	Euro	3.84%	-11.09%	2.81%
Indian Rupee To US Dollar	0.014	0.013	0.012	Indian Rupee To US Dollar	0.43%	-6.29%	-4.67%
Japanese Yen	0.009	0.008	0.007	Japanese Yen	-2.82%	-16.49%	-6.45%
Korean Won	0.001	0.001	0.001	Korean Won	3.14%	-11.40%	-1.12%
Norwegian Krone	0.116	0.104	0.095	Norwegian Krone	9.56%	-10.63%	-8.96%
Pound	1.376	1.233	1.242	Pound	7.29%	-10.36%	0.75%
Russian Ruble	0.014	0.014	0.012	Russian Ruble	-2.10%	5.37%	-17.93%
Swedish Krona	0.117	0.099	0.094	Swedish Krona	7.38%	-15.15%	-4.67%
Swiss Franc	1.094	1.047	1.113	Swiss Franc	2.73%	-4.29%	6.29%

7 <https://stats.oecd.org/index.aspx?queryid=169>

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Acquisitions in 2023 – Mindshare Leaders



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
Autodesk	UNIFI	Cloud software solution for organizing, accessing, and managing content in Revit, Civil 3D, Plant 3D and other digital design tools
	FlexSim	Factory and logistics center simulation
Centric Software (DS)	Aifora	AI-powered price and inventory optimization solution
PTC	ServiceMax	Field service management (FSM)
	pure-systems	Product and software variant management solutions
SAP	LeanIX	Enterprise architecture management (EAM) software
Siemens	BuntPlanet	Smart water network management solutions

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Acquisitions in 2023 – S&A



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
Altair	OmniQuest	Optimization software
	OmniV	Product development software
Ansys	Rocky	Particle dynamics simulation
	Diakopto	EDA solutions to accelerate IC development
Keysight Technologies	ESI Group	S&A solution provider
ZWSOFT	Concentration, Heat and Momentum Limited (CHAM)	CFD simulation software

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Acquisitions in 2023 – CAM



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
Sandvik (4)	PMT Premier Machine Tools Limited	Solutions provider to medical customers in Ireland, with full coverage of machines, tools and services
	Polymathian Industrial Mathematics	Mine optimization software and services
	Postability	NC (numerical control) post processors for Mastercam
	esco GmbH	Design, production, and quality inspection in gear manufacturing

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Acquisitions in 2023 – EDA



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
Cadence Design Systems	Rambus, Inc.	SerDes and memory interface PHY IP business
	Intrinsic Corporation	A wholly owned subsidiary of CEVA, provider of design engineering solutions focused on the US A&D industry
Siemens	Insight EDA	Circuit reliability solutions
Synopsys	PikeTec	Verification and testing tools for automotive software

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Acquisitions in 2023 – SI/Reseller/VAR



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
Accenture (28)	Inspirage	Oracle cloud specialist (PLM system integrator)
Addnode (3)	Key Performance	DS partner specializing in MBSE
	Team D3	Autodesk Platinum Partner
BAE Systems	Eurostep	Standards-based digital thread platform
CENIT	mip Management Information Partner GmbH	Data management specialist

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Acquisitions in 2023 – SI/Reseller/VAR



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
CENIT	Active Business Consult Informationstechnologie GmbH	Process optimization for SAP solutions
PDSVISION	Boston Engineering	PTC reseller business

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Acquisitions in 2023 – AEC



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
ABB	WindEXCo	Minority stake in analytics software provider for improving performance and reliability of wind turbines
AVEVA	Schneider Electric	Combination of AVEVA and Schneider assets (New AVEVA)
Bentley Systems	EasyPower	Design and analysis software tools for electrical engineering professionals
	Blyncsy	AI services for transportation departments to support operations and maintenance
BIMcollab	BIMlink	BIM-centered Common Data Environment (CDE)
Hexagon	LocLab	3D digital twin creation

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Acquisitions in 2023 – AEC



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
Hexagon	Projectmates	SaaS enterprise construction project management software
	CADS Additive GmbH	Software to prep designs for metal additive manufacturing (AM)
	4PS Group	Mine automation, mine production optimization
Trimble	Ryvit	Integration Platform-as-a-Service (iPaaS) provider for the construction industry
	Transporeon	Cloud-based transportation management platform

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Announced Acquisitions



Consolidation in Simulation & EDA

CIMdata HIGHLIGHT

Cadence Acquires BETA CAE Systems

Electronics industry solution provider expanding multiphysics systems design and analysis solutions portfolio

On Tuesday, March 14, 2023, a definitive agreement was announced between Cadence Design Systems, Inc. and BETA CAE Systems, Inc. The acquisition is part of Cadence's strategy to provide more complete software-centric solutions to their current customers as well as customers in new industry segments. Automotive industry solutions should be an area in which the combined companies will find the most synergies in terms of customers, but future solution portfolios can be expected to address Keysight's strengths in EDA applied across a broad set of verticals including aerospace, defense, space systems, and high-tech electronics.

CIMdata HIGHLIGHT

Keysight Advances "Software-Centric" Solutions with ESI Acquisition

Electronics industry solution provider expanding portfolio into mechanical simulation and analysis solutions

On Wednesday, 28 June 2023, Keysight Technologies, Inc. (NYSE: KEYS) announced its intention to acquire the entire share capital of ESI Group SA (Euronext Paris Symbol: ESI). ESI Group SA is celebrating its 50th year of existence this year and has a broad range of virtual prototyping solutions for automotive and aerospace end markets.

While Keysight is a relative unknown in the traditional Simulation and Analysis software industry as tracked by CIMdata, they do in fact provide software solutions for electronics design, development, and validation based on their PathWave portfolio (<https://www.keysight.com/usa/products/simulation.html>). This acquisition is part of their strategy to provide more complete software-centric solutions to their current customers as well as customers in new industry segments. Automotive industry solutions should be an area in which the combined companies will find the most synergies in terms of customers, but future solution portfolios can be expected to address Keysight's strengths in EDA applied across a broad set of verticals including aerospace, defense, space systems, and high-tech electronics.

CIMdata HIGHLIGHT

Synopsys Takes a Big Leap in the EDA Solutions Segment with Ansys Acquisition

Electronics industry solution provider consolidating solutions across "silicon-to-systems" and "systems-to-silicon" development

intention to acquire Ansys, the multiphysics simulation software provider. This acquisition will provide Synopsys with the simulation and analysis capabilities for the combined company from their current combined portfolio. This acquisition, if completed, will underpin the trend in a broad range of industry-to-silicon. The trend has

CIMdata HIGHLIGHT

Renesas Acquires Altium Limited

To create system-level lifecycle management platform

On February 15, 2024, Renesas, a leading global provider of microcontrollers, announced that they have entered into an agreement to acquire Altium Limited, a global leader in printed circuit board (PCB) design tools. Renesas will acquire all outstanding shares of Altium for a cash price of \$66.50 per share (\$544.51 at today's exchange rate of 0.65 AS to US\$), a total equity value of approximately \$5.1 billion (approximately US\$5.92B). This is part of Renesas digitalization strategy announced in October 2023.

The two companies' shared vision is to establish "an integrated and open electronics system design and lifecycle management platform that allows collaboration across component, subsystem, and system-level design." They plan to leverage Altium's existing platform capabilities, including their cloud-native Altium 365 offering. Since its introduction in May 2020, Altium has expanded Altium 365's capabilities and announced a number of partnerships supporting the solution.

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Acquisitions in 2023 – AEC



Some big, many tuck-ins but still at a high rate, 161 overall

Acquirer	Acquired	Comment
Hexagon	Projectmates	SaaS enterprise construction project management software
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Trimble	Ryvit	Integration Platform-as-a-Service (iPaaS) provider for the construction industry
	Transporeon	Cloud-based transportation management platform

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Changes in Market Sample



Looking to cover more and more of the overall PLM market

- Most of the acquisitions will not affect the overall market results
 - Of course, acquisitions will affect the results of individual companies
 - Compensate for acquisitions by adjusting un-allocated revenues
- Will follow up in next year's process to see if any of the acquisitions are contributing to their PLM business
- Beyond acquisitions, in any given year, we may add several other companies to our analysis

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Defining PLM

 Digital transformation of the lifecycle, enabled by the product innovation platform

PLM is...

- A strategic business approach powered by a consistent set of solutions
- Enabled by product innovation platforms that support the extended enterprise
- An approach that spans the full lifecycle, from idea through life
- Enables a set of evolving functional domains orchestrated by an extended enterprise-level “systems of systems” approach



The diagram illustrates Multi-Disciplinary Lifecycle Optimization as a central blue circle surrounded by six smaller circles, each representing a functional domain: Portfolio & Program Management, System Ideation, System Realization, Profitability Management, Quality Compliance, and Service Management.

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PLM Market Categories

 Three major segments comprise the PLM Market

- collaborative Product Definition management
 - Applications & solutions that capture, manage, disseminate, visualize and collaborate on product related intellectual (digital/virtual) information, including related processes
- Tools
 - Applications that are used to create intellectual assets
 - Authoring, analysis, modeling, simulation and documentation of product and plant/facility information
- Digital Manufacturing
 - Process planning, resource definition, factory floor layout and product flow simulation and analysis (including ergonomics)

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Overall PLM Results



Growth in 2023 under forecast

- Overall PLM growth (8.6%) just below forecast (10.1%)
- Large currency fluctuations affected results
- Another strong year for S&A and EDA leaders
- Mechanical CAD is reaching saturation and flattening
- Continued industry consolidation, new entrants, investor interest, and action
 - SI/Reseller/VAR the most active segment, Accenture (again) but slowing
 - Many companies buying up their VARs
 - Major PLM players trying to differentiate, expand reach

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2023 Market Results



Results by segment (US\$ Millions)

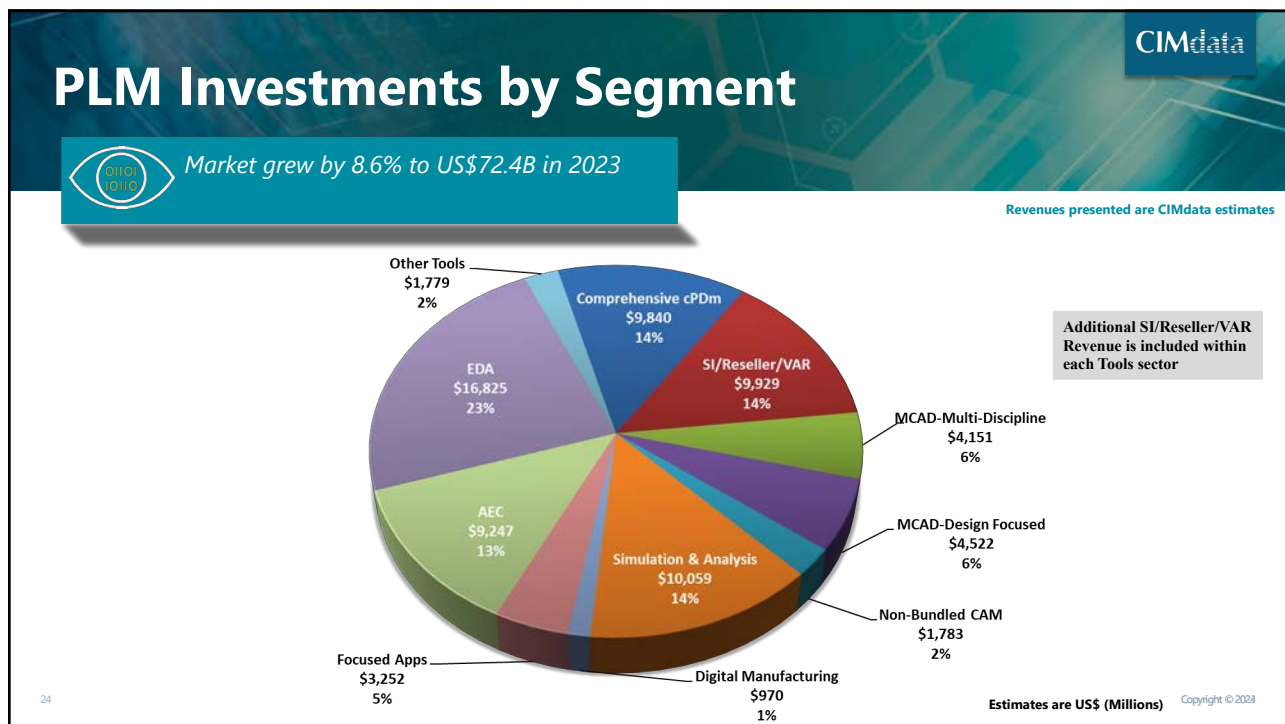
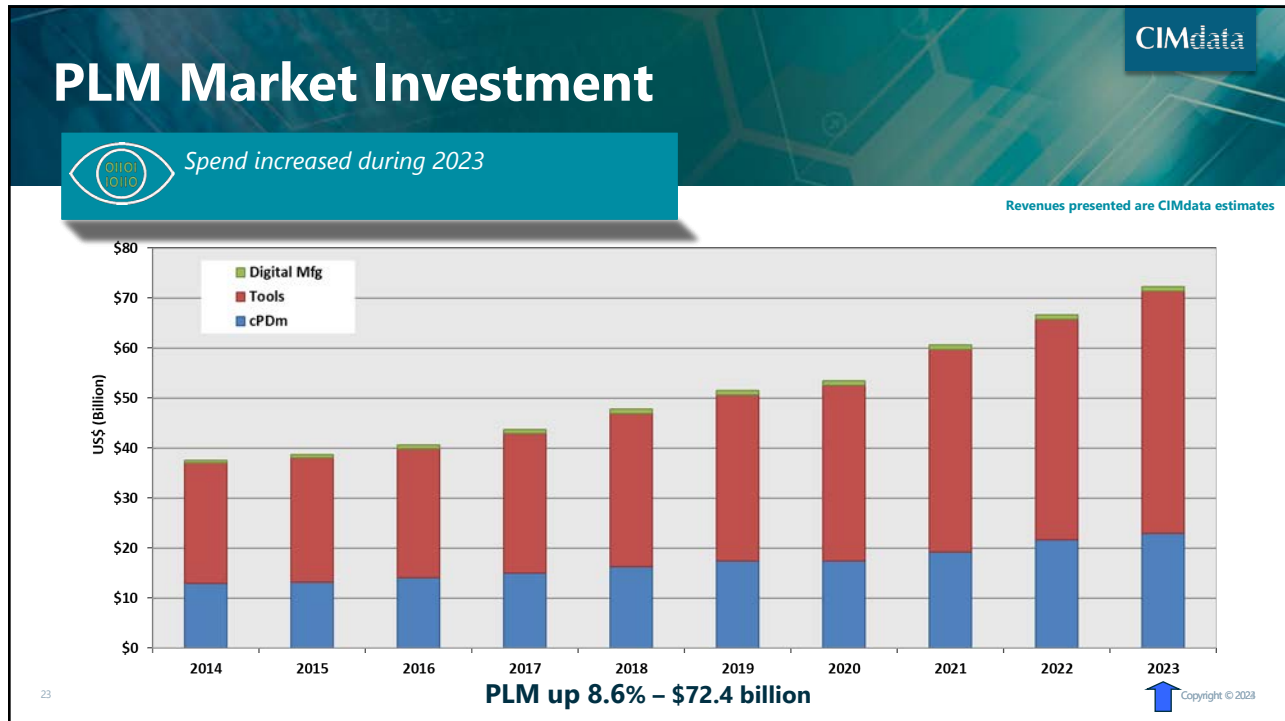
Segment	2023 Revenues	YoY Growth
cPDM Comprehensive Technology Providers	\$9,839.8	6.0%
cPDM-Focused Applications	\$3,252.3	4.9%
Digital Manufacturing	\$969.8	6.2%
SI/Reseller/VAR	\$9,928.5	7.2%
Tools		
MCAD-Multi-Discipline	\$4,151.3	1.7%
MCAD-Design-Focused	\$4,521.5	5.0%
Non-Bundled CAM	\$1,782.6	5.0%
Simulation & Analysis	\$10,059.1	9.0%
Other Tools (e.g., ALM)	\$1,778.6	7.2%
EDA	\$16,825.4	12.4%
AEC	\$9,246.5	13.6%
Total	\$72,355.5	8.56%

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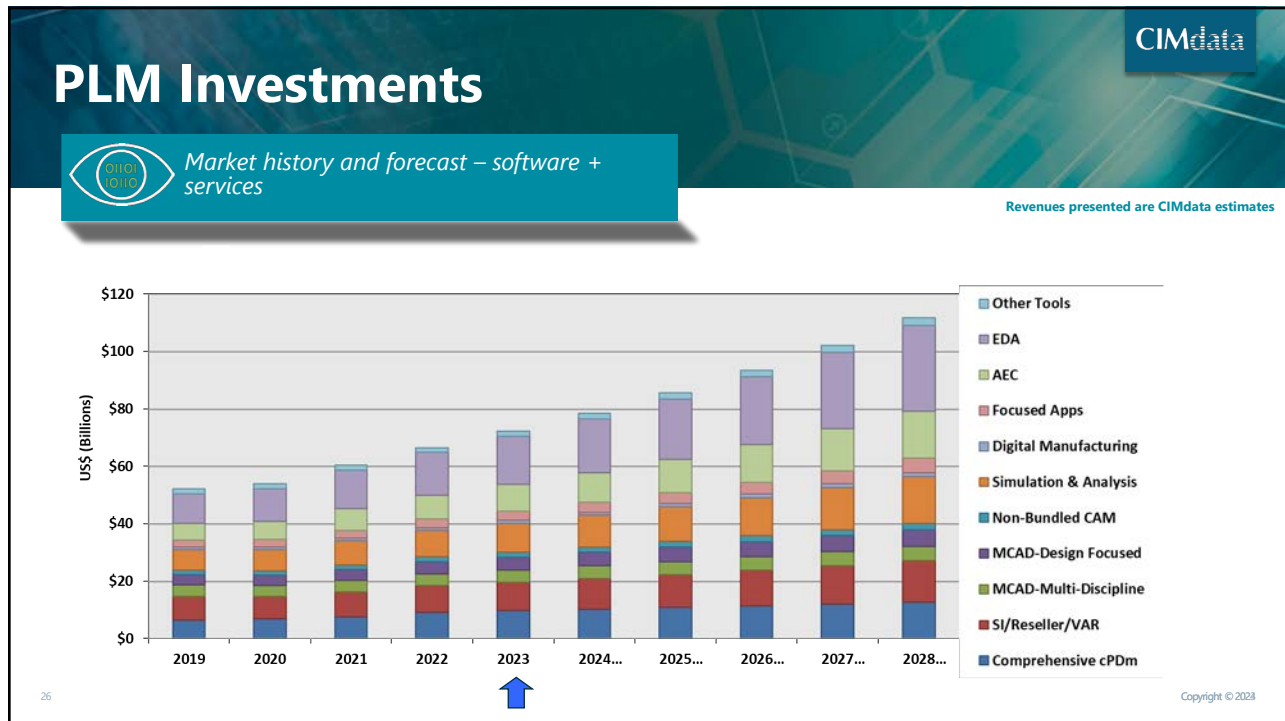
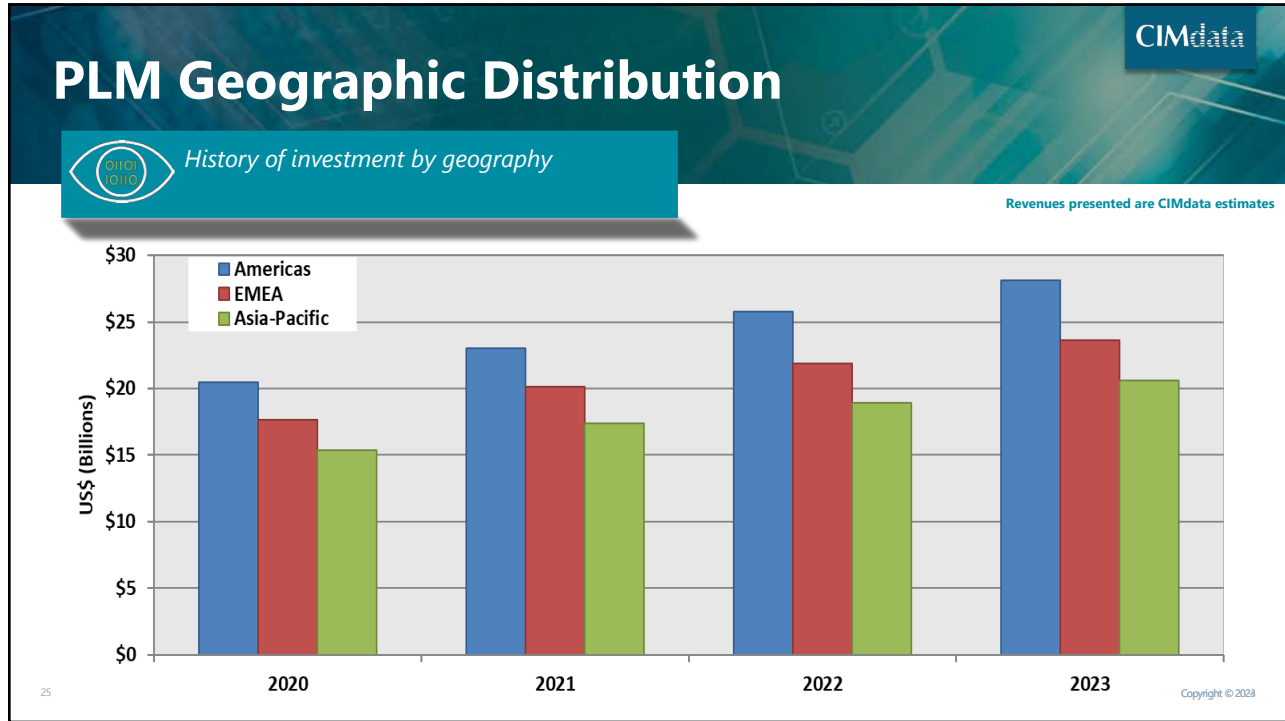
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PLM Market in 2024



Trends strong, economic headwinds ahead

- What does 2023 mean for the coming years?
- Growth in EMEA expected to pick up in 2024
- Siemens move to SaaS will accelerate – ACV is market standard
- Still seems to be remaining appetite for M&A, particularly in Other Tools and Focused Applications
- The promise of AI/ML is driving data integrations

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Market Forecasts



2024 (US\$ Millions) and 5-year compound annual growth rate (CAGR)

Segment	2024 Estimate	YoY Growth	5 Year CAGR
cPDM Comprehensive Technology Providers	\$10,374.14	5.4%	5.4%
cPDM-Focused Applications	\$3,479.94	7.0%	9.5%
Digital Manufacturing	\$1,027.96	6.0%	7.1%
SI/Reseller/VAR	\$10,703.97	7.8%	7.8%
Tools			
MCAD-Multi Discipline	\$4,336.70	4.5%	3.5%
MCAD-Design Focused	\$4,758.91	5.2%	5.3%
Non-Bundled CAM	\$1,871.73	5.0%	5.0%
Simulation & Analysis	\$11,011.03	9.5%	9.9%
Other Tools (e.g., ALM)	\$1,920.92	8.0%	9.2%
EDA	\$18,813.10	11.8%	12.1%
AEC	\$10,313.54	11.5%	12.1%
Total	\$78,611.94	8.6%	9.1%

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- Overall cPDm Market Analysis
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cPDm Segment of the PLM Market



cPDm is a core element of a PLM environment

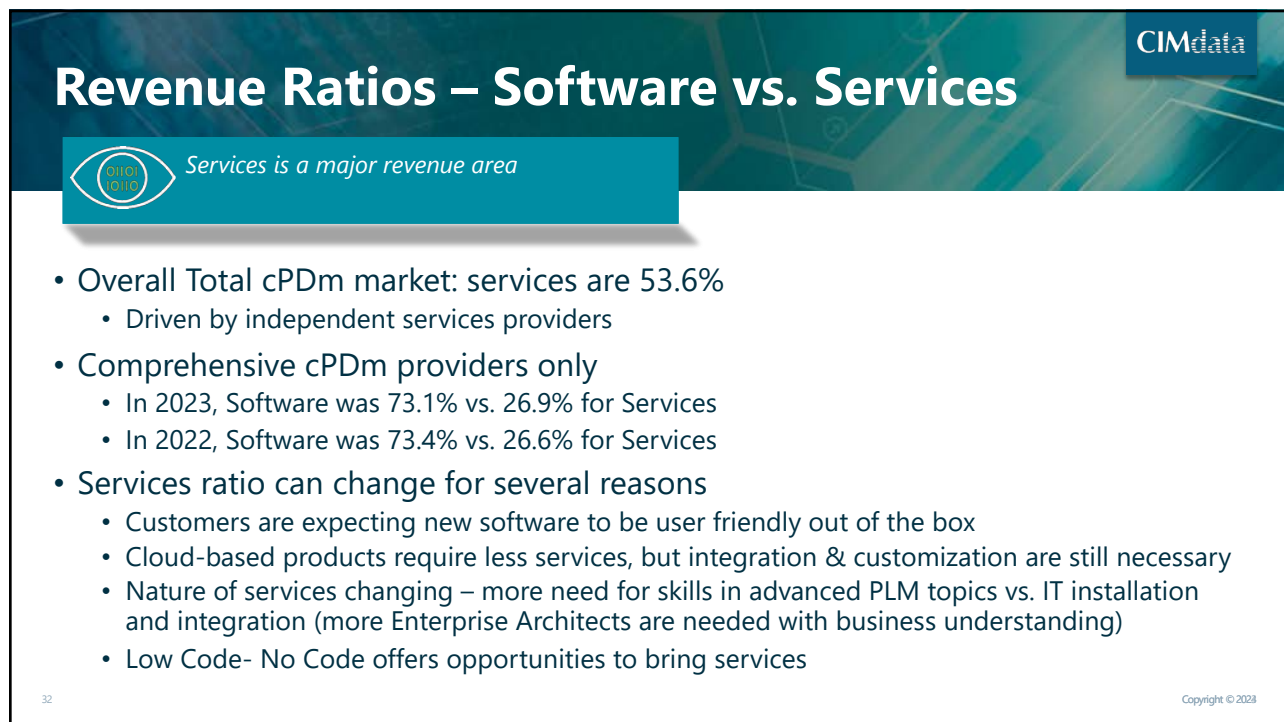
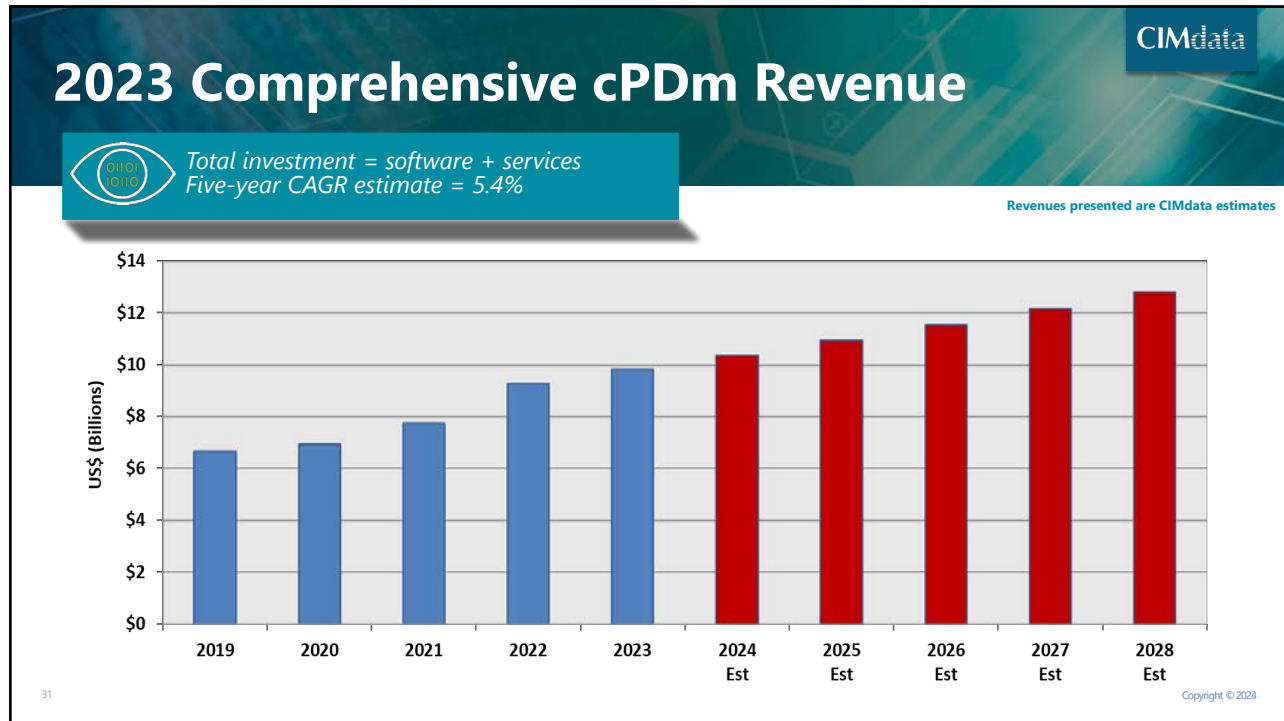
- Managing intellectual assets
 - Management of product information and processes
 - Workflow, vaulting, content, document management
 - Visualization and collaboration
 - Product structure
 - Configuration and change management
 - Strategic product planning
 - Project and program management
 - Compliance and sourcing
 - Others

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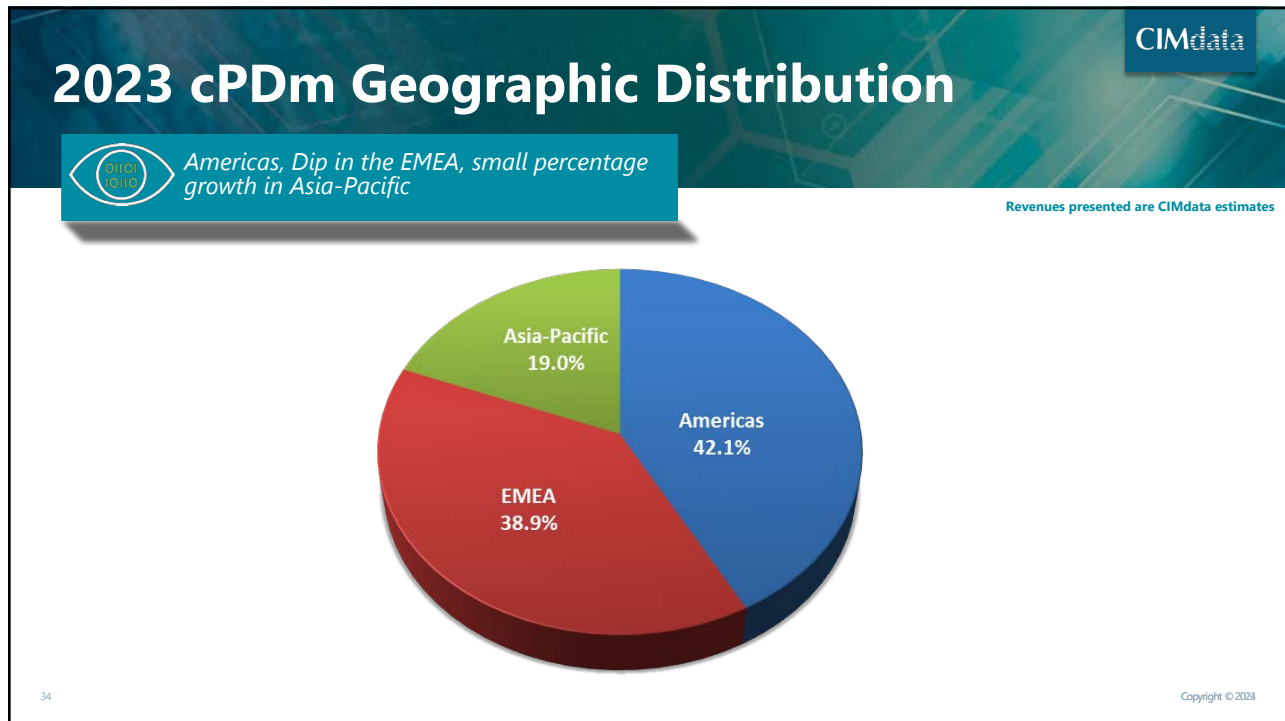
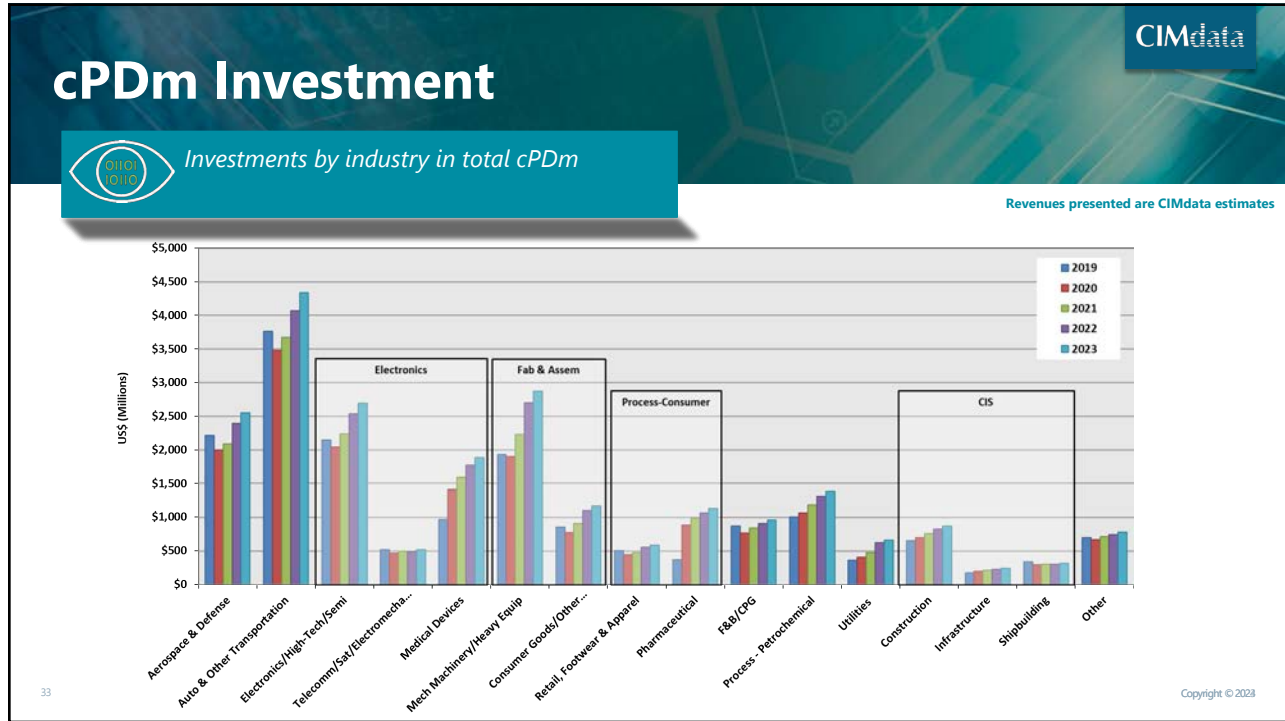
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PLM Mindshare Leaders



Who do people think about?

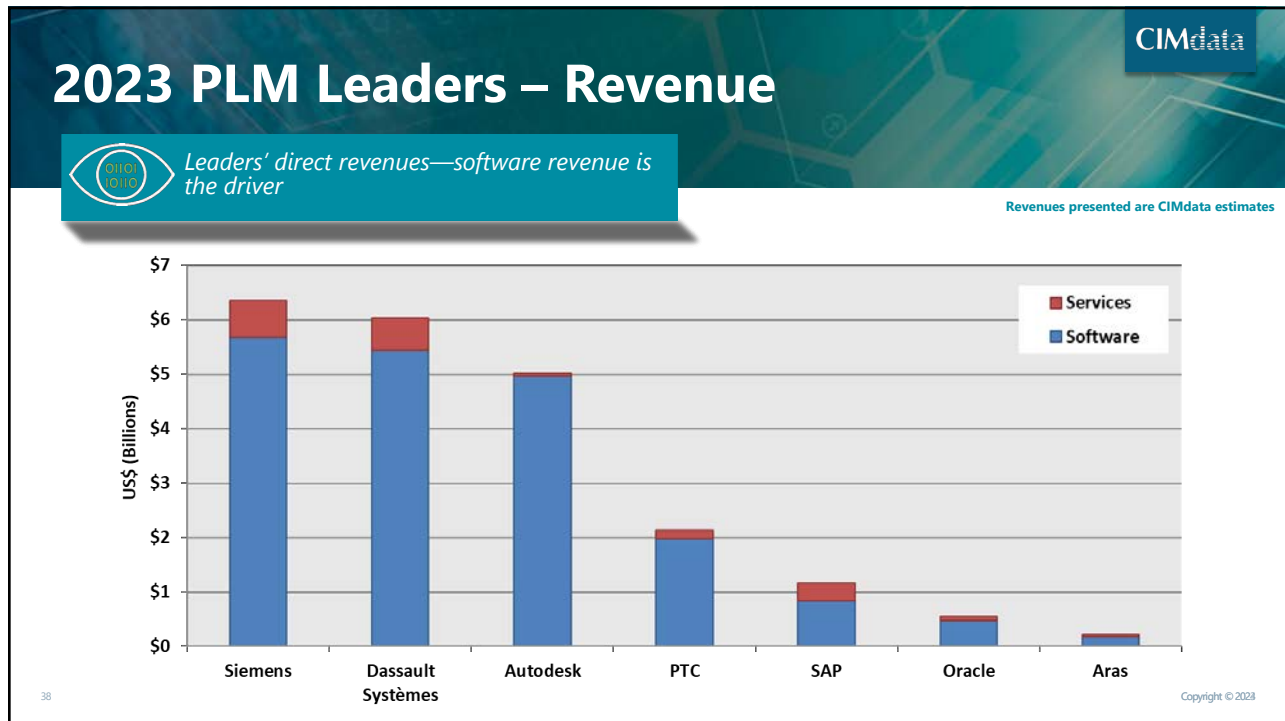
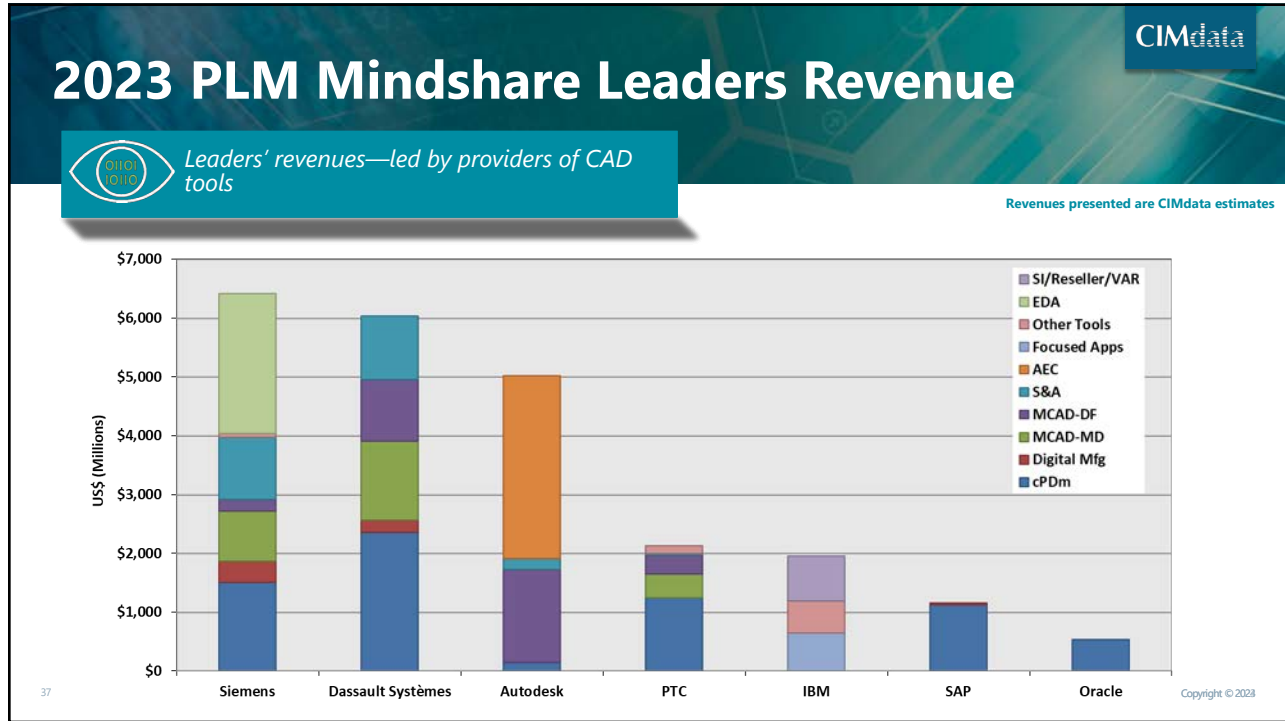
- These companies are perceived as leading the market
 - Number, size, and scope of implementations
 - Technology and thought leadership
- All are comprehensive, lifecycle-focused providers
 - Some were leaders in the PDM market
 - Some also provide tools – primarily MCAD and S&A
- Are developing broad PLM platforms, and addressing new industries and geographies

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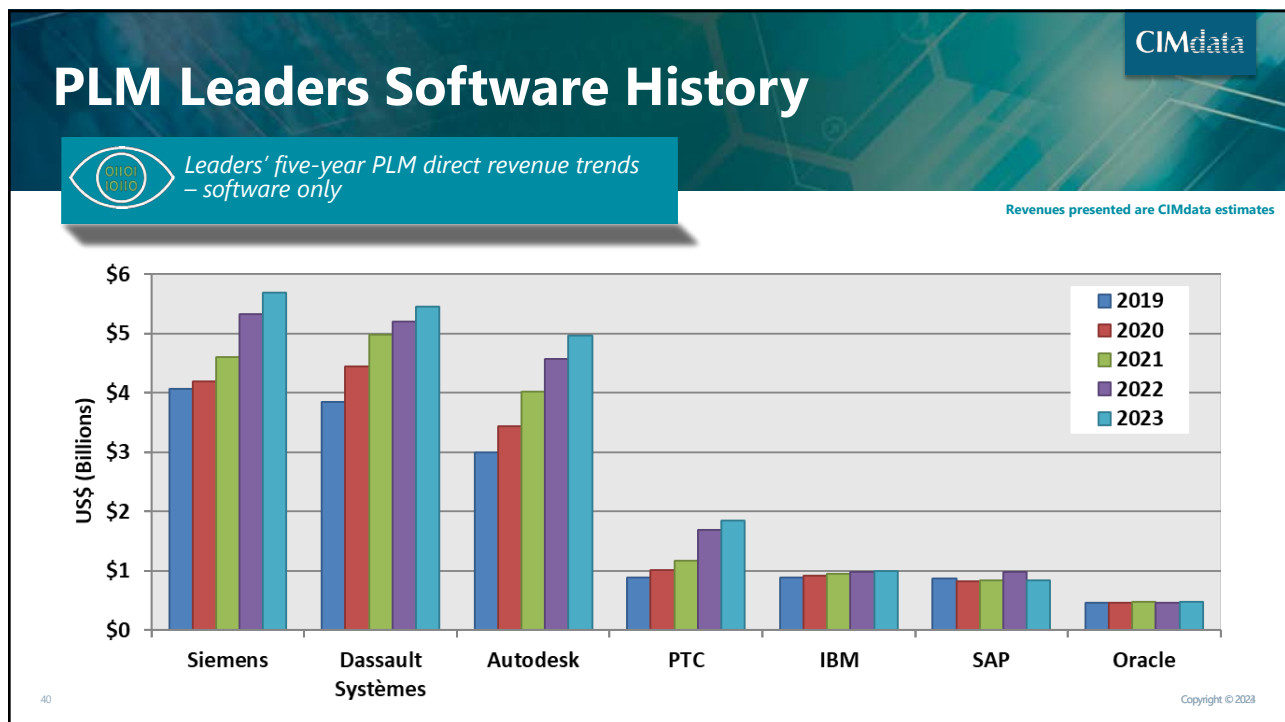
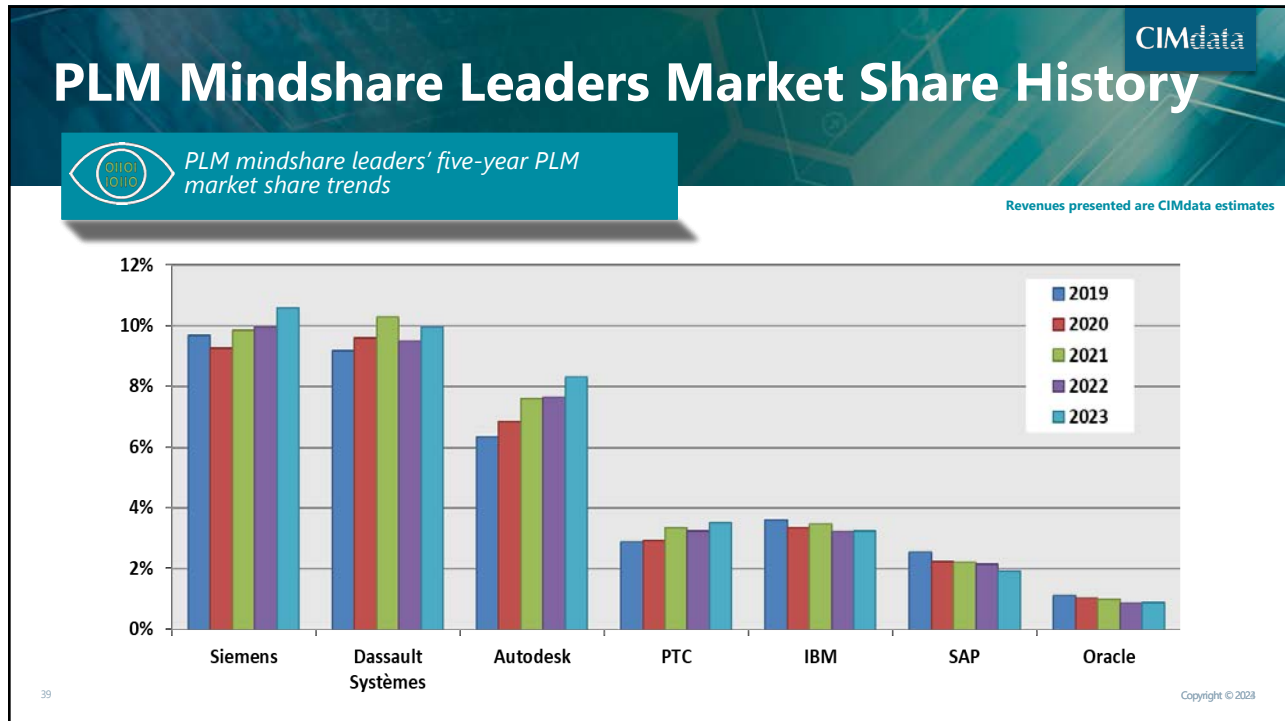
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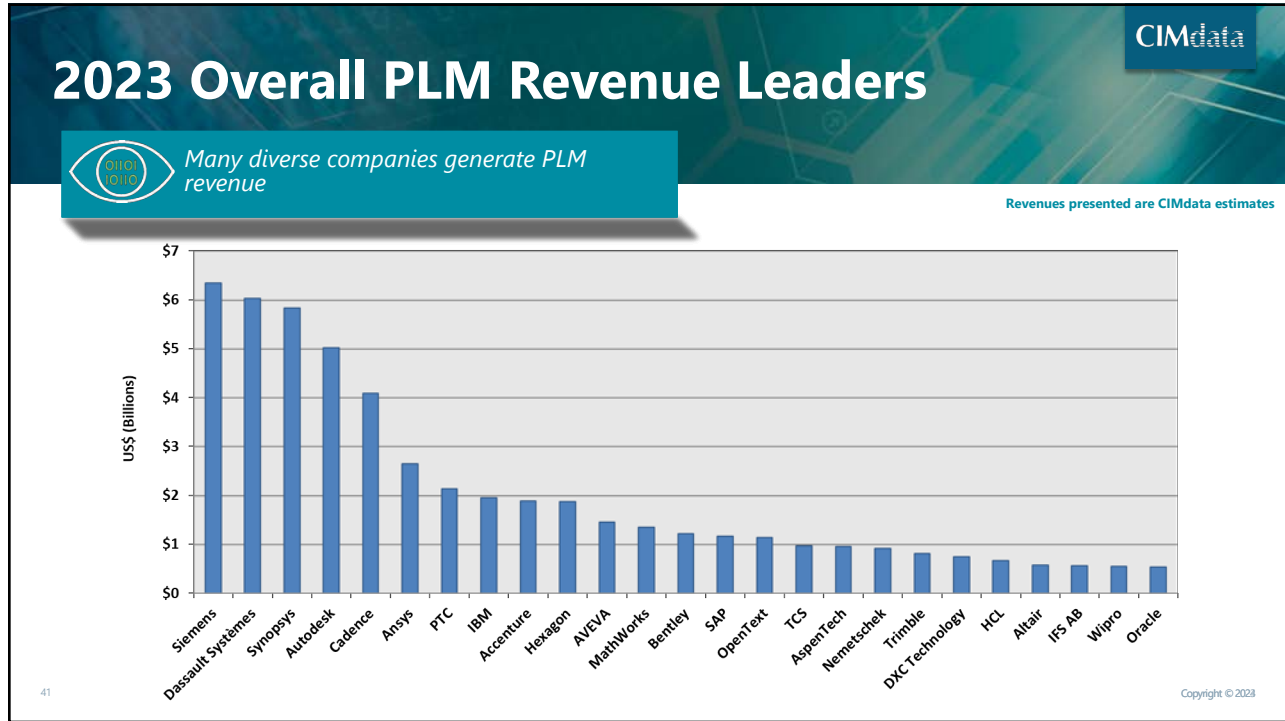
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Scope of Services Continues to Evolve

More and different services are needed—even more of a challenge now

- PLM continues to expand connectivity into other mission critical business systems
 - Expanding footprint, support for digital thread requires higher levels of integration
 - Cloud – cloud-to-cloud, cloud-to-on-premise interconnection
- Anticipation of AI is driving companies to assure their data is properly structured to leverage various use cases
 - Data is becoming increasingly machine readable, systems integration is critical
- Low Code, No code application factories are a bright spot for SIs

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Focused Application Providers

Expanding PLM through innovation

- Focused providers help expand the PLM market
 - Digital Supply Chain has high opportunity
 - Create solutions that complement major providers' suites
- Many create technologies and solutions that are acquired or embedded into the comprehensive providers' product suites
- Frequently become acquisition targets
 - E.g., PTC and ServiceMax
- Difficult to continue to measure separately post-acquisition

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cPDM Provider Analysis

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Review of cPDM provider revenue performance

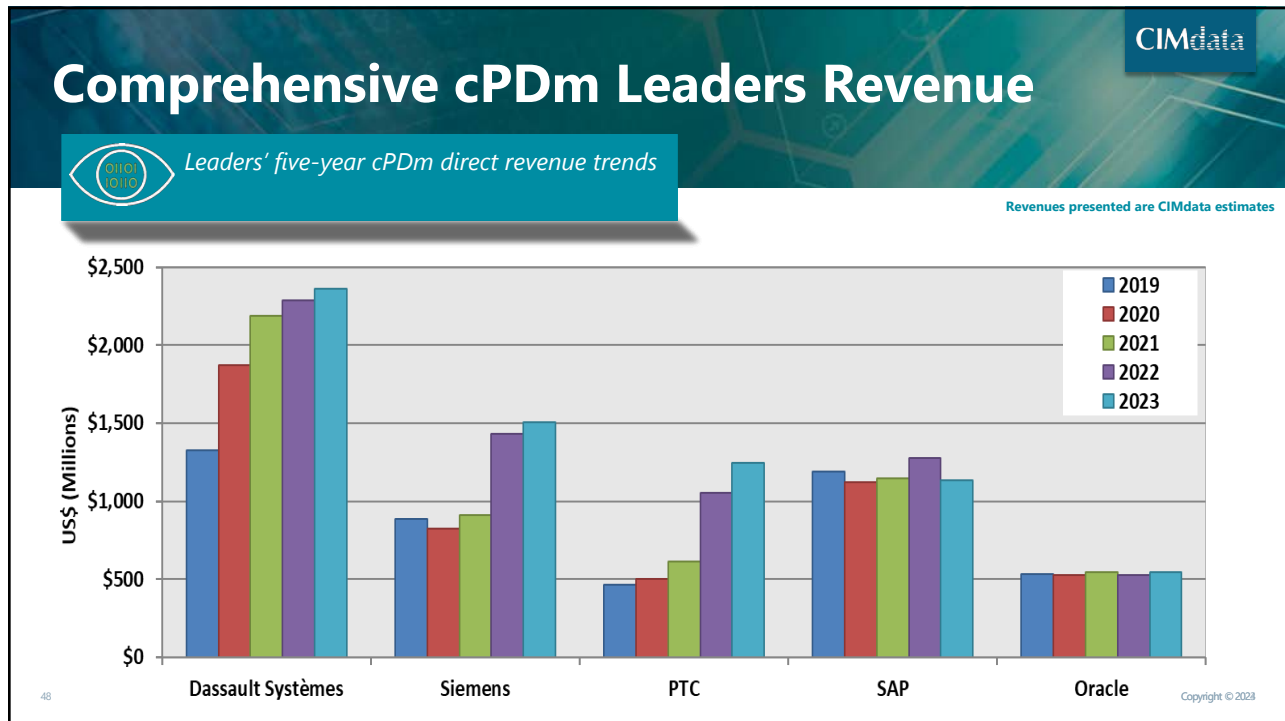
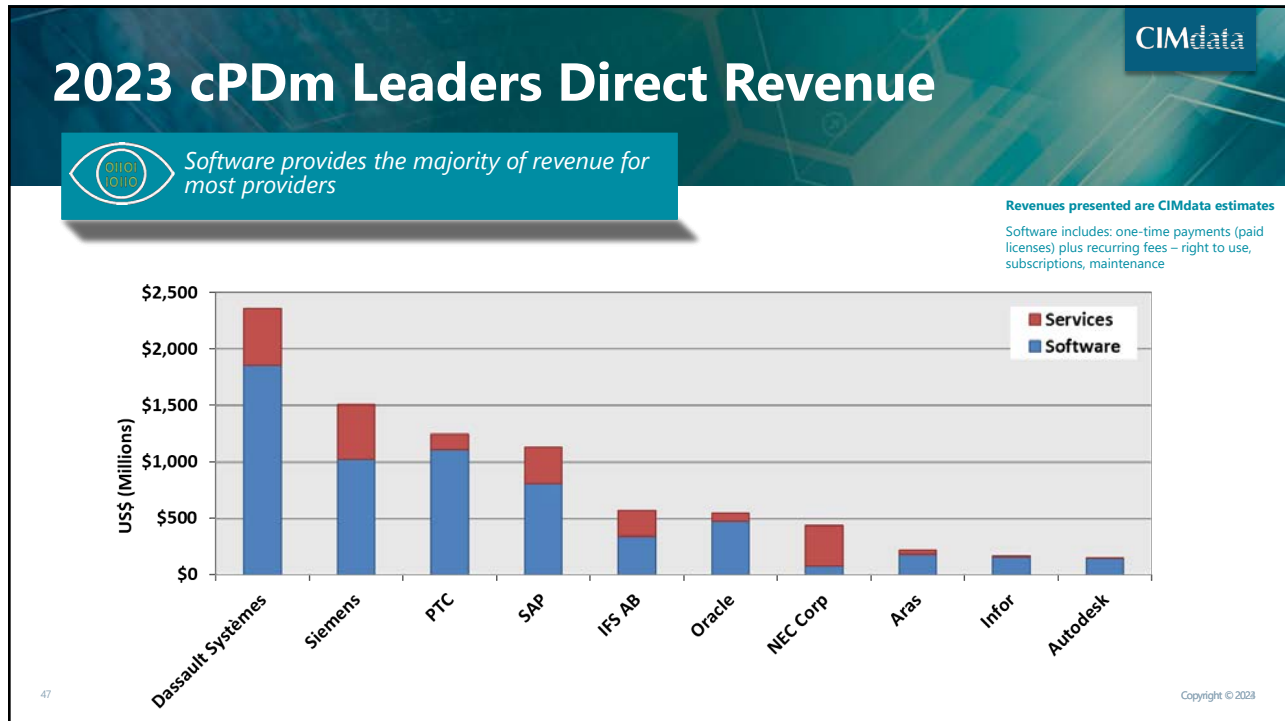
- cPDM sector results softer than expected, currency had impacts
- Comprehensive segment dominated by “mindshare” leaders
 - Aras, Dassault Systèmes, Oracle, PTC, SAP, and Siemens
- Other major providers
 - Autodesk, IBM, IFS, and Infor
 - NEC focused on Japan
- New providers continue to emerge
 - Continuing the expansion
 - Cloud-native (Ganister, JWI, OpenBOM, etc.), some on cloud platforms (Propel)
 - Local providers, i.e., China

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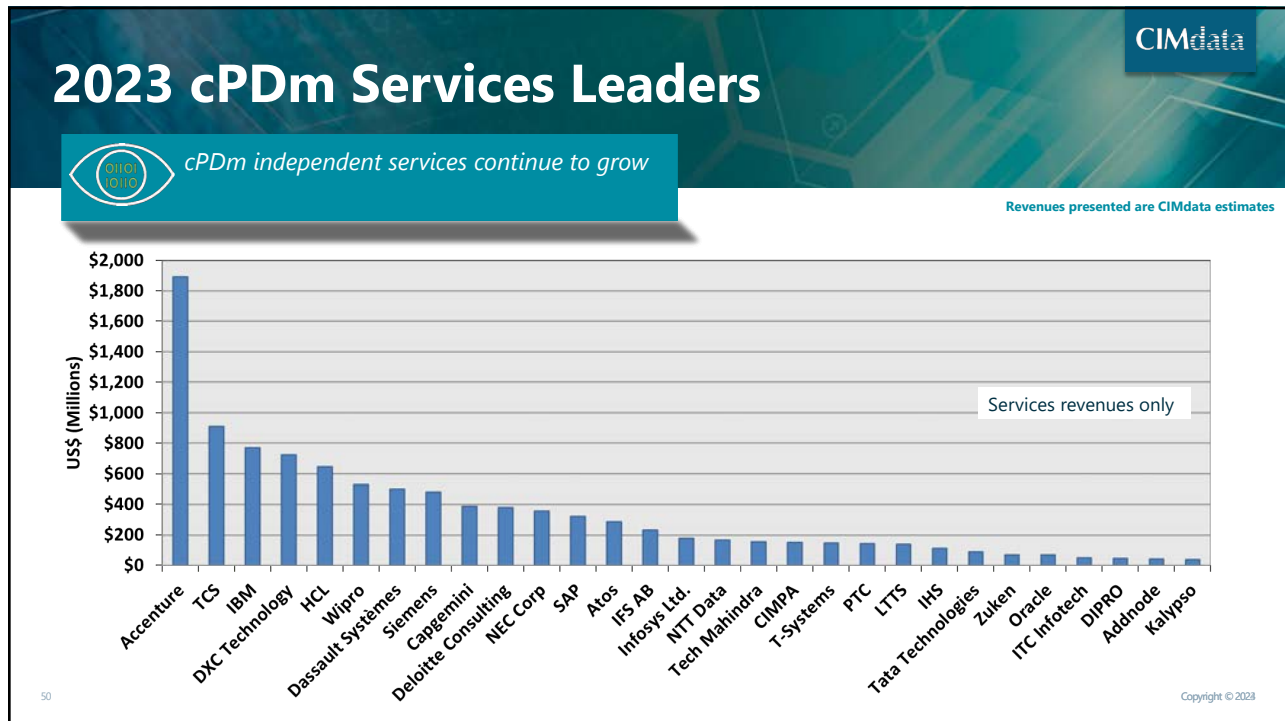
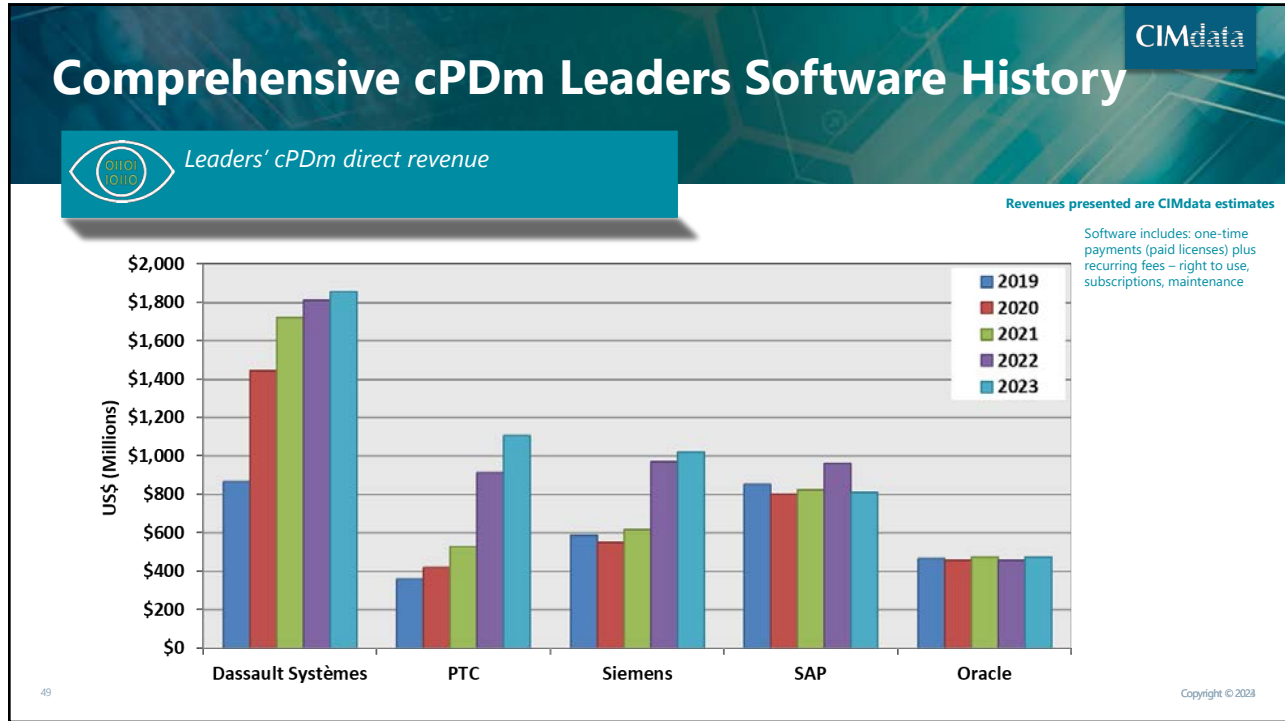
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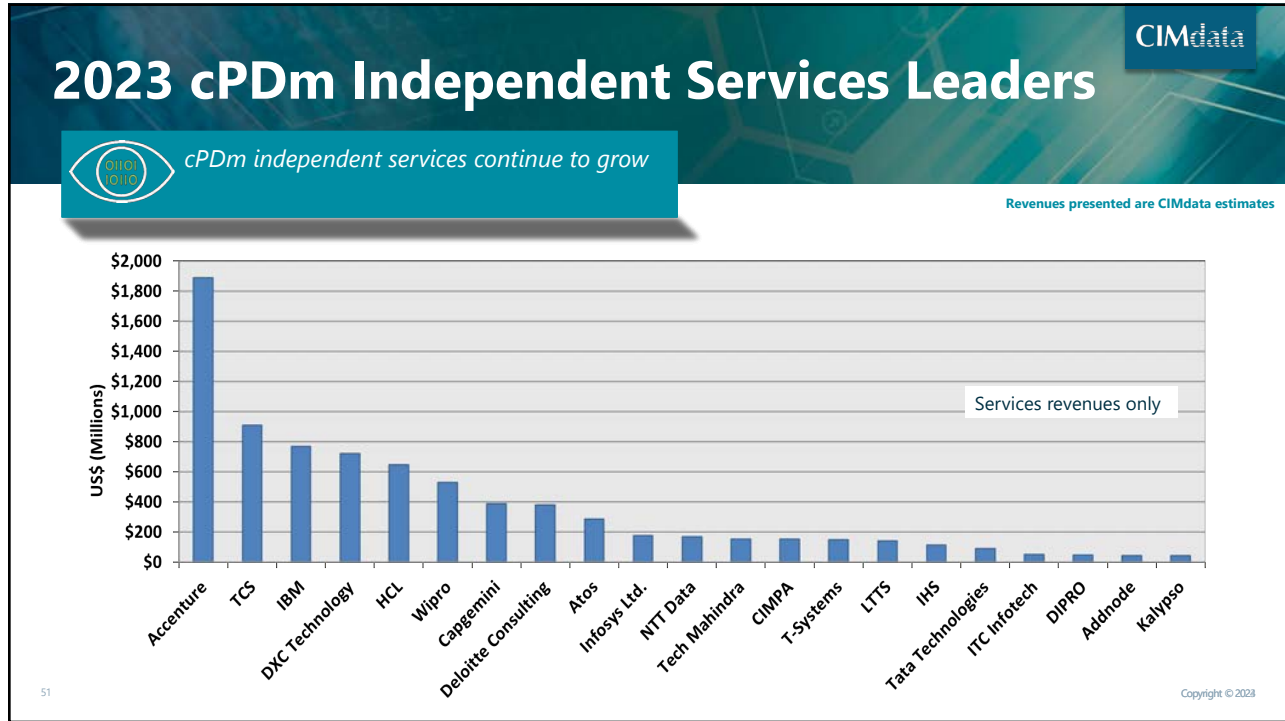
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Overall cPDM Providers

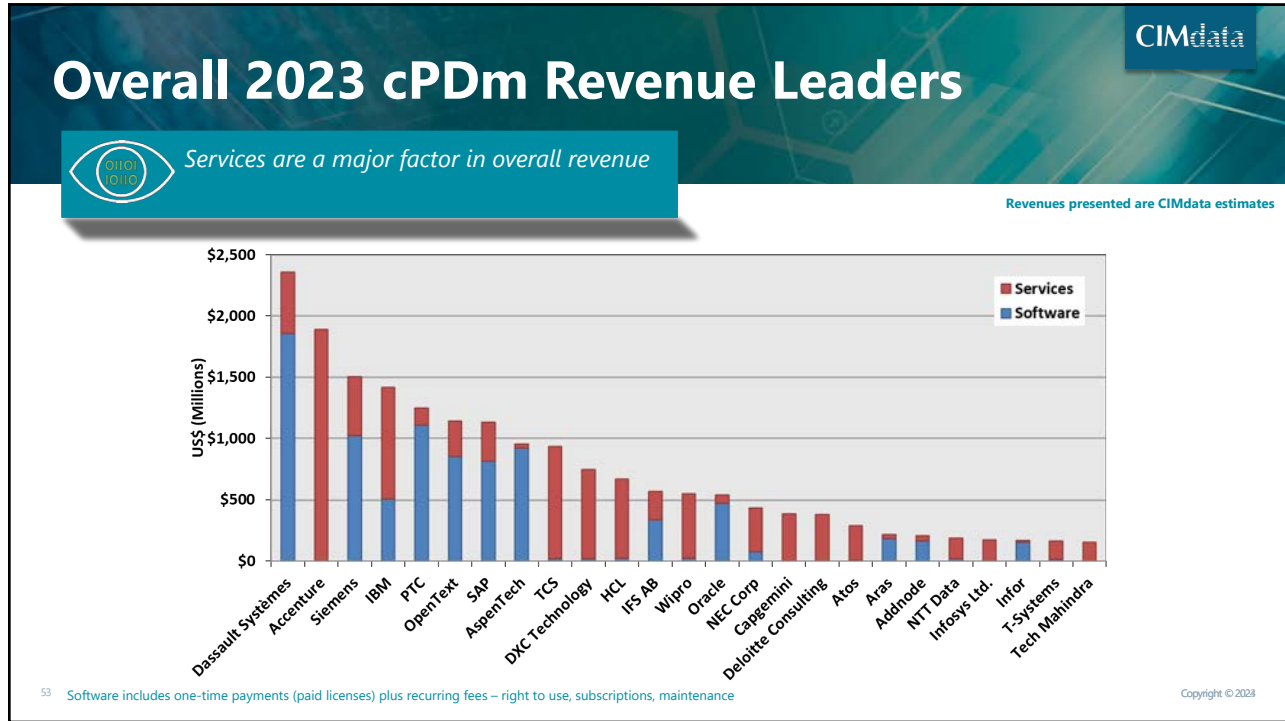
Continuing evolution among the overall leaders

- Leaders are from all cPDM segments
 - These providers do not always compete
 - Some partner on selected accounts
- Service providers continue to grow
 - Both organically and through acquisitions
- Fifteen cPDM solution and service providers larger than \$400M in 2023 (same as in 2022)

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Comments on Tool Segments

Continued impact from conflict in Ukraine

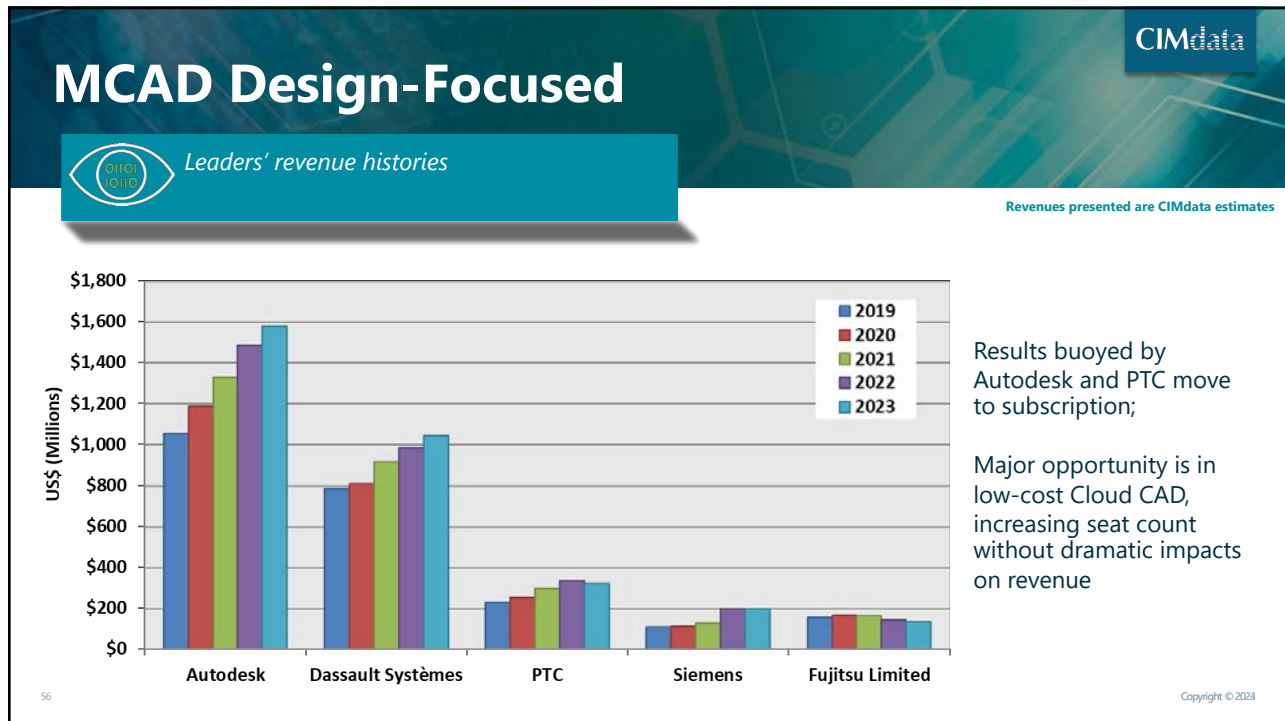
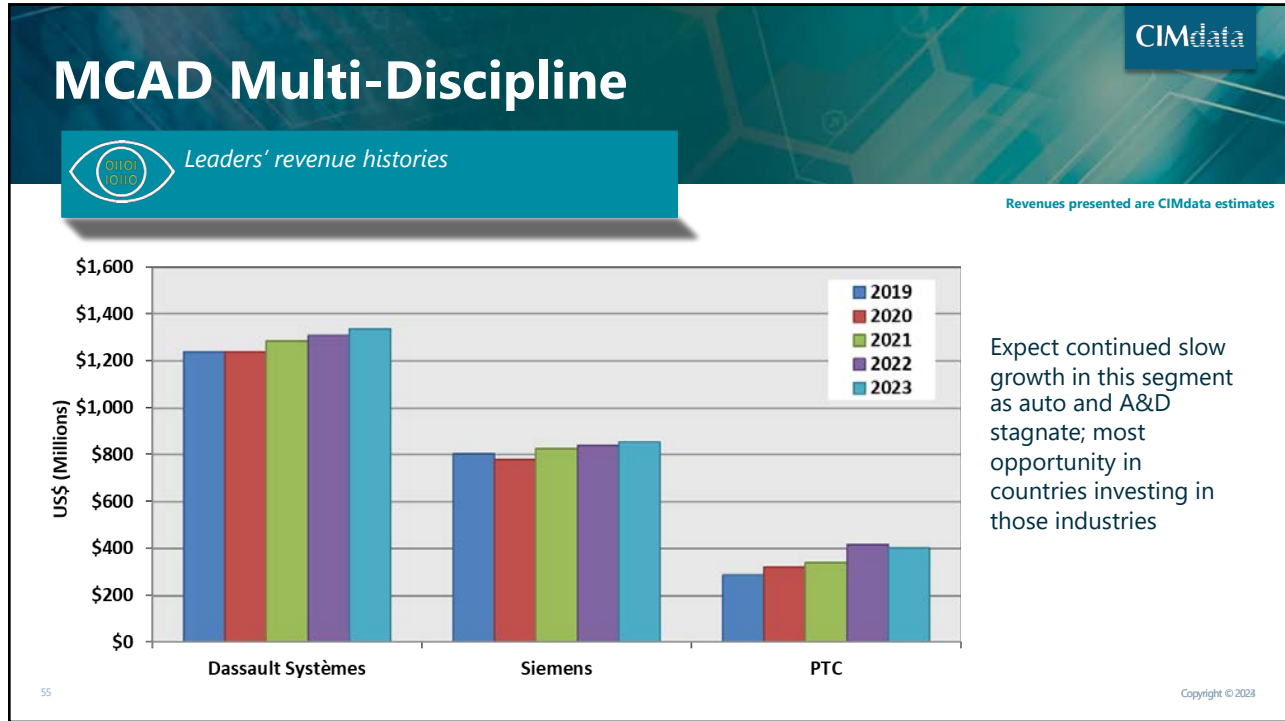
Segment	Comments
MCAD-MD	Expect continued slow growth in this segment as auto and A&D stagnate; most opportunity in countries investing in those industries
MCAD-DF	Results buoyed by Autodesk and PTC move to subscription, questions about continued high growth
CAM	A bit lower growth in 2023, expect similar result in 2024
S&A	Significant M&A activity in market leaders, trends driving growth will remain strong (smart connected product/Industry 4.0, need for more simulation on the left side of the Vee)
EDA	Strong year, even stronger for leaders than the overall market; same trends as S&A
AEC	Key to (re)defining the built world, expanding interest in discrete PLM capabilities; oil & gas affected by energy prices, economic turmoil
Other Tools	Again, smart connected products driving investments; e.g., Atlassian up 26% in FY 2023

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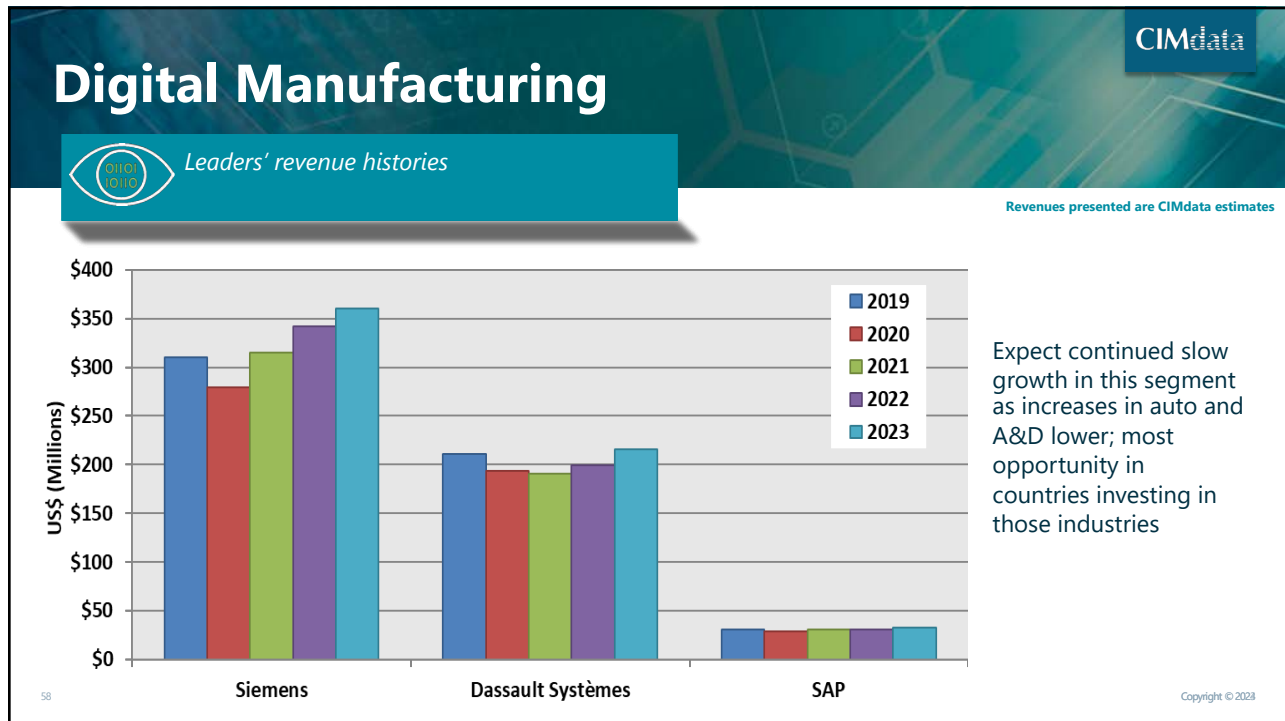
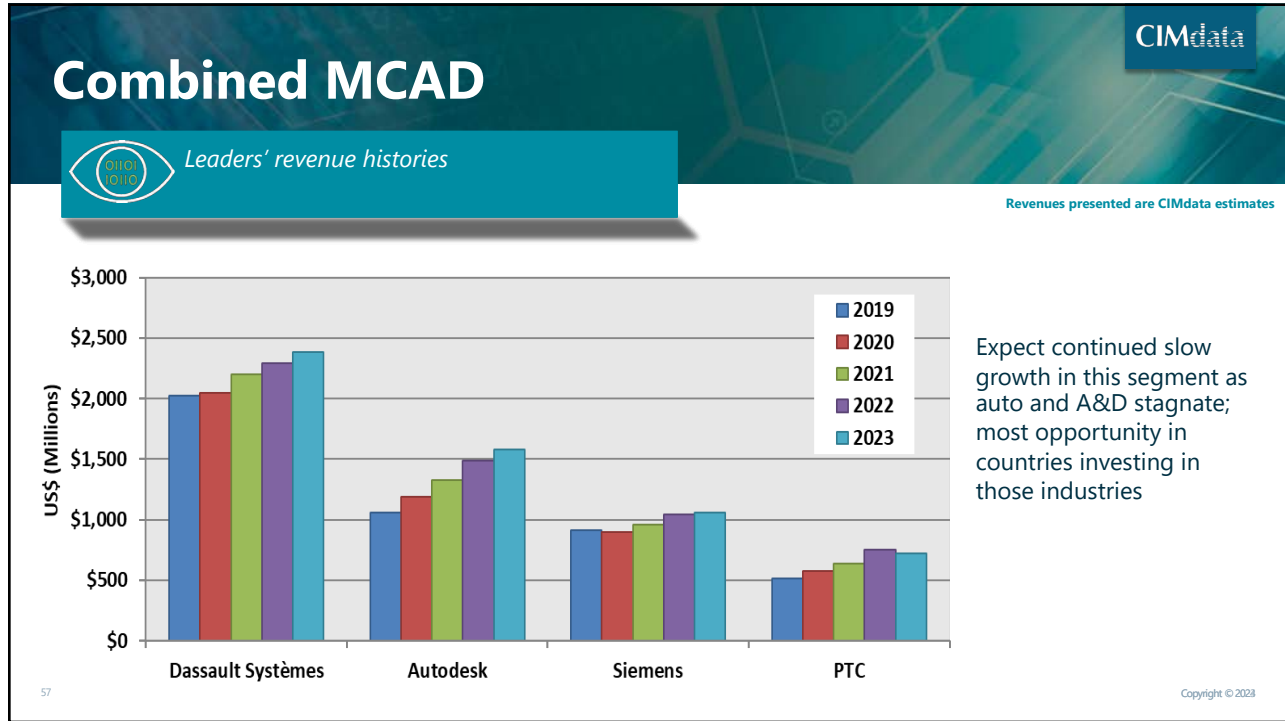
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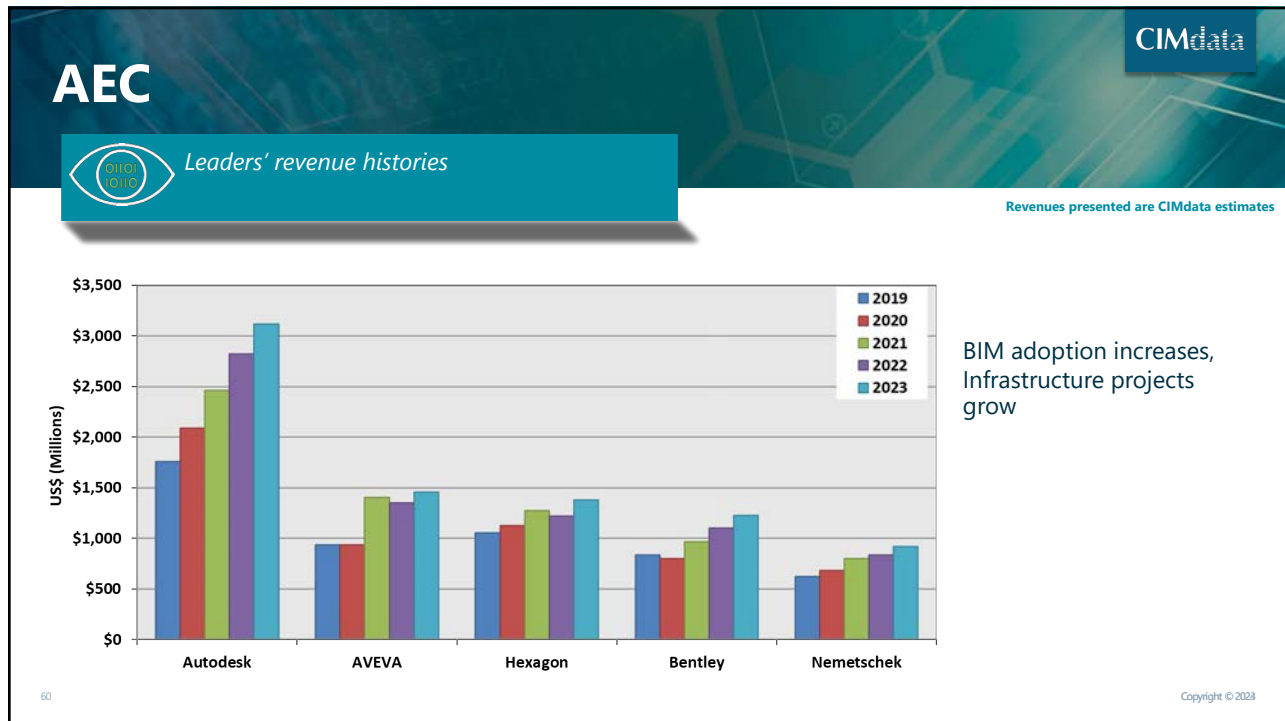
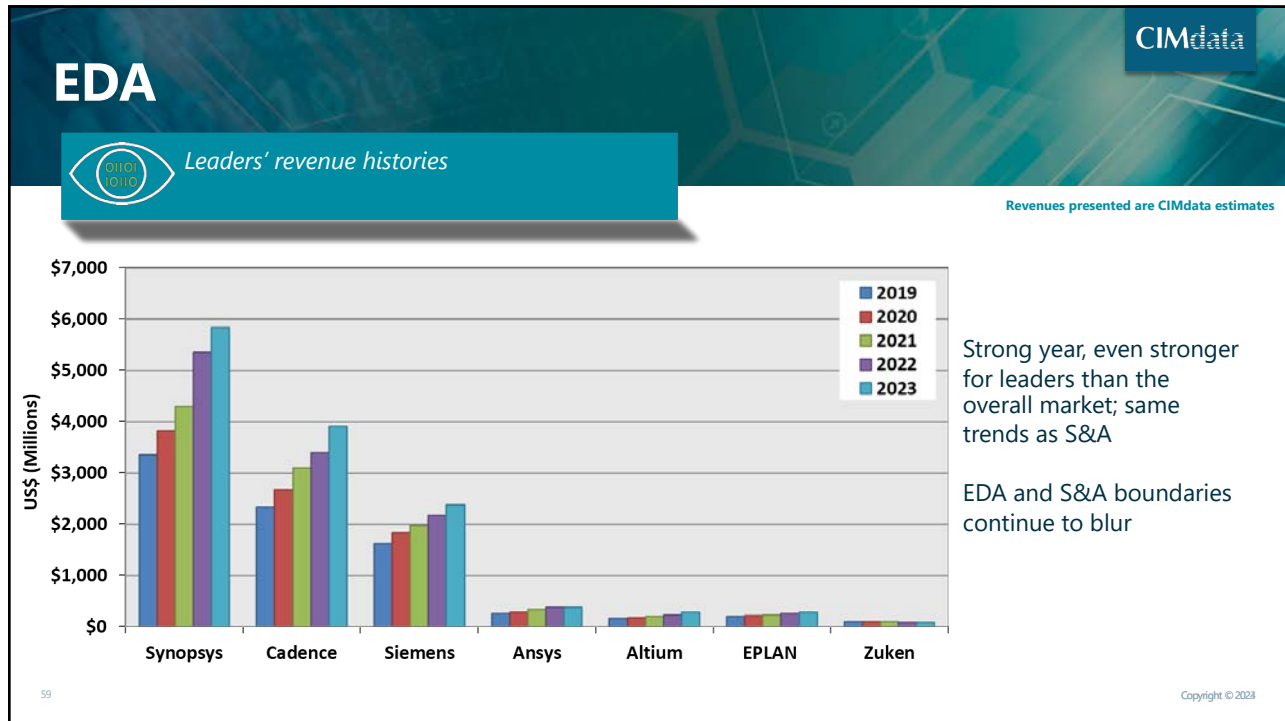
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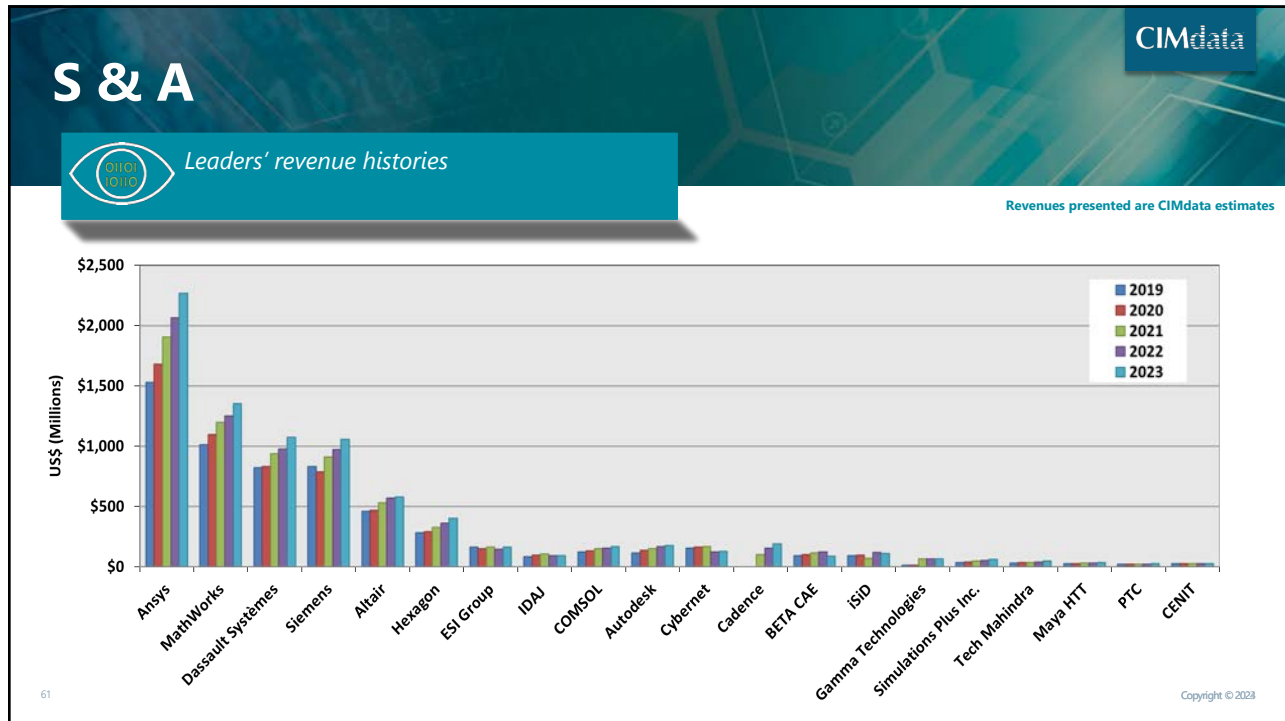
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Agenda

- PLM Market Analysis
- Overall cPDM Market Analysis
- PLM Provider Analysis
- Provider Sector Analysis
- Concluding Remarks

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Concluding Remarks



Factors impacting the PLM Economy

- Lower than forecast, a lot of currency impacts
- Subscription can backstop declines, assuming no defections
- Simulation and systems engineering still key
- Mergers and acquisitions will continue to play a role
 - Providers look to fill out their portfolios
 - An important part of the platformization trend
 - A lot of activity in the SI/Reseller/VAR space
- Cloud interest and action seems to be at a tipping point
- Refresh programs continue, as suggested in recent CIMdata research

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- S&A market data
 - Company size
 - Software and service delivery
 - By industry
 - By geography / country
- Includes qualitative section on Top 10 S&A solution providers




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Questions & Answers

 What's on your mind?



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