RESEARCH SUMMARY

Domestic PLM (Product Lifecycle Management) Market: Key Research Findings 2017

◆ Research Outline

> **Yano Research Institute has conducted a study on the domestic PLM market with the following conditions:**
> 1. Research period: From October 2016 to March 2017
> 2. Research targets: PLM System Makers
> 3. Research methodologies: Face-to-face interviews with expert researchers, surveys via telephone/email
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> **<What is PLM (Product Lifecycle Management)?>**
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> PLM (Product Lifecycle Management) is a concept of managing a product throughout its lifetime from the phases of development, production to maintenance or even recycling. The PLM market in this research targets the following tools to embody PLM, such as CAD/CAM/CAE, PDM (Product Data Management), Digital Factory, and Viewer/DMU (Digital Mock-Up).

◆ Key Findings

■ Domestic PLM Market in 2016 Expected to Rise by 5.0% to Achieve 242.4 Billion Yen

The domestic PLM market, based on the shipment values at system makers, is projected to rise by 5.0% from the previous year to attain 242.356 billion yen. The PLM market is connected with the condition of the manufacturing industry. Ever since quantitative easing has been adopted in 2013 that have brought about weaker yen and stable domestic demands, the companies in the manufacturing industry, mainly some exporting companies, have improved their profitability and have raised the capital investments in recent years. These factors have contributed to keep the domestic PLM market stable.

■ PLM System Makers Aiming to Acquire New Business Opportunities through Progress of Digitalization

As can see in Industrie4.0 in Germany and Industrial Internet in U.S., adoption of IT technologies in the next-generation manufacturing has been accelerated. It is considered that digitalization will be extended to all areas in the future. By getting on the bandwagon, the PLM system makers are aiming to gain new business chances by providing tools to embody VR or AR, as well as failure prediction solutions.

■ Domestic PLM Market Projected to Attain 290 Billion Yen by 2020

The domestic PLM market is projected to continue the steady growth in 2017 and beyond, attaining 290 billion yen by 2020. When looking at the domestic PLM market by industry, in addition to the next generation automobiles contributing to the robust industry of automobile/transportation machines, the development and acceptance of automated driving systems in the future can be the growth factors as well. The PLM market for industrial machinery continues being favorable, but electric and electronic machinery is likely to be the same level as the previous year, due to increase of unstable factors like acquisition and financial crisis.

◆ Report Format

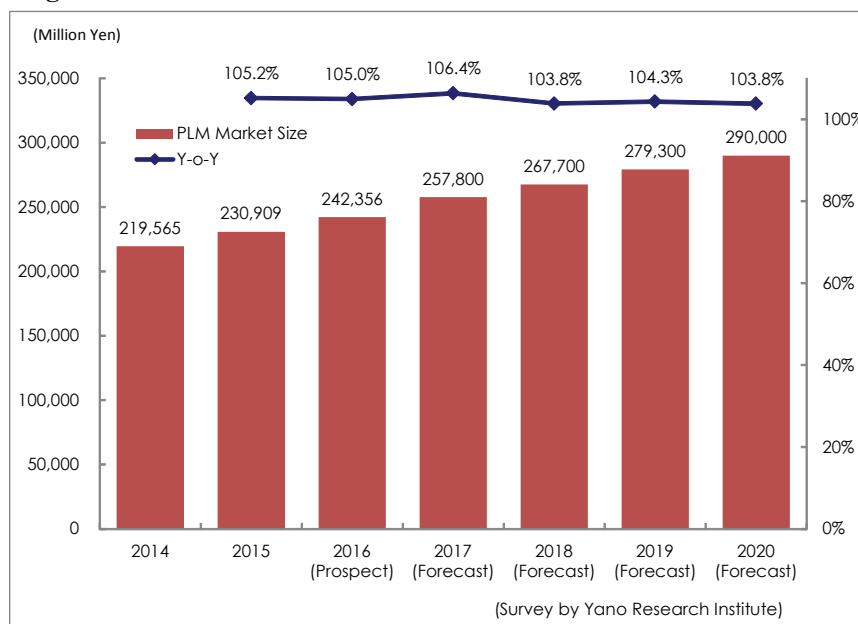Published report: "PLM (Product Lifecycle Management) Market 2017"
Issued on: March 27, 2017
Language: Japanese
Format: 248 pages in A4 format
Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

■ **Figure 1: Transition and Forecast of Domestic PLM Market**

(Survey by Yano Research Institute)

Notes:
1. The market is based on the shipment values at PLM system manufacturers. While the hardware sales are excluded, the sales of maintenance and other services are included.

■ **Table 1: PLM System Tools**

Category	Definition
PLM	PLM (Product Lifecycle Management) is a concept of managing a product throughout its lifetime from the phases of development, production to maintenance or even recycling. The PLM market in this research targets the following tools to embody PLM, such as CAD/CAM/CAE, PDM (Product Data Management), Digital Factory, and Viewer/DMU (Digital Mock-Up).
CAD/CAM/CAE	Designing tools using computers. There are 2-D CAD, 3-D CAD、CAD/CAM for Mold Designs, CAE for machinery, and more.
PDM	PDM (Product Data Management) integrates all the information on product designing and development to streamline the manufacturing processes and save time.
Digital Factory	A system that conducts planning of entire manufacturing planning processes. Those tools for layout, designing, simulation, testing, and implementation of the manufacturing processes and robot simulations are included.
Viewer/DMU	The Viewer is a tool for displaying contents of a 3D data file. DMU (Digital Mock-Up) is a simulation tool that enables to compare and examine the product appearance, inner structure, and etc.