

## **CAD/CAM/CAE Systems Market: Latest Research Findings 2011**

~ Making a Vigorous Recovery from the Great East Japan Earthquake Disaster with an  
Expectation of 7.4% Market Growth from the Previous Year ~

### ➔ **Research Outline**

**Yano Research Institute has conducted a study on the CAD/CAM/CAE systems market in Japan based on the following research outline.**

1. Research period: From May to September 2011
2. Research targets: Manufacturers of CAD/CAM/CAE systems for machine designing (59 firms), EDA manufactures (12 firms), manufacturers of CAD for civil and construction engineering (20 firms)
3. Research methodologies:  
Face-to-face interviews by our specialized researchers, supplemented by interviews via telephone and e-mail

### ➔ **Key Findings**

◆ **CAD/CAM/CAE systems market is expected to recover with 7.4% year-on-year increase in 2011.**

In 2010, the CAD/CAM/CAE systems market amounted to approx. 271.2 billion JPY, 1.1% increase from the year before, in terms of sales of industry players. In 2011, it will further grow to approx. 291.2 billion JPY, which represents 7.4% increase year-on-year.

Japanese manufacturing sector rapidly picked up in fiscal 2010 due to increased exports to China and other Asian countries. However, the market ended up with only 1.1% growth from the previous year in FY2010 ended March 2011 due to the Great East Japan Earthquake occurred on March 11, 2011, which brought about freeze or postponement of system updates.

In FY2011, the CAD/CAM/CAE market is projected to grow by 7.4% from the previous year, being supported by early recovery of supply chains realized by the quick responses after the earthquake and solid growth of Asian economies despite concerns over yen appreciation and economic slowdown in Europe and U.S.

◆ **Major manufactures started to provide CAD/CAM/CAE systems through SaaS one after another.**

A number of major manufactures started to provide CAD/CAM/AE systems and PDM (Product Data Management) systems through SaaS (Software as a Service) one after another. More and more products have become compatible with cloud computing very rapidly, which could impact in future on business models prevailing in CAD/CAM/CAE market.

◆ **Attention must be paid to solutions that could enable cooperative development between three different areas, CAD/CAM/CAE systems, embedded software and EDA.**

One of biggest challenges for Japanese manufacturing sector to be tackled with is how to promote cooperative development between the three types of systems, CAD/CAM/CAE, embedded software and EDA. Thus attention is paid to the solutions that could make possible the promotion of the cooperative development.

➔ **Report format:**

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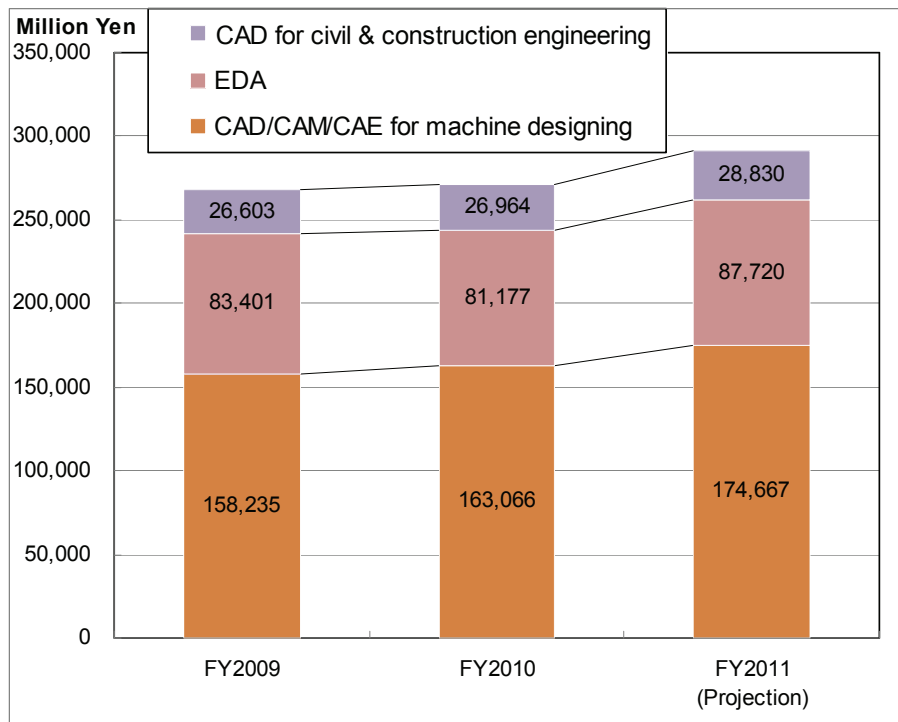
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**Figure/Table 1: CAD/CAM/CAE Systems Market Size**



(Unit: million Yen, %)

	FY2009	FY2010	yr/yr	FY2011 (Projection)	yr/yr
CAD/CAM/CAE for machine designing	158,235	163,066	103.1%	174,667	107.1%
EDA	83,401	81,177	97.3%	87,720	108.1%
CAD for civil & construction engineering	26,603	26,964	101.4%	28,830	106.9%
<b>Total</b>	<b>268,239</b>	<b>271,207</b>	<b>101.1%</b>	<b>291,217</b>	<b>107.4%</b>

Estimated by Yano Research Institute

Notes:

1) The above figures are based on sales value of suppliers.

2) The figure for 2011 is projection.

3) The figures for 2009 do not correspond with the figures introduced in the past except for those for EDA since research targets were reviewed and revised.