

2024 PLM Market Results

2025 Market & Industry Forum—10 April 2025

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2024 PLM Market Results
PLM Market & Industry Forum
A CIMdata PLM Leadership Event

10 April 2025—Frankfurt, GERMANY

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Strategic management consulting for competitive advantage in global markets

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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 2024
- Present our estimates provider revenues by various categories
- Provide insight into investment changes, trends and market leaders
- 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 2024 and may differ from a provider's fiscal year reported financials
- Reported revenues are estimates and final numbers will be published in the annual Market Analysis Reports (MARs)
- Currencies impact growth estimates – all estimates are based on the yearly average for conversion of a currency to US dollars

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Agenda

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- PLM Market Analysis
- Overall cPDM Market Analysis
- PLM Provider Analysis
- Provider Segment 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
 - Nearly 500 companies get surveyed via email or web meeting
 - Repeated reminders increase response rate
 - 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
 - CIMdata global contacts used as “sanity checks” on anomalous inputs
- Total of approximately 500 companies “touched” by CIMdata process

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Update on Modeling Methodologies



Migrating to machine readable data to enable data as a service

- CIMdata market model has changed
- Removed manual calculations moving to a machine-readable data structure that supports more powerful analytics
- Migration may have caused some impact to historical data points
- Yes, the charts have improved!
- Sample on iPad
- Questions on specific charts can be addressed at lunch

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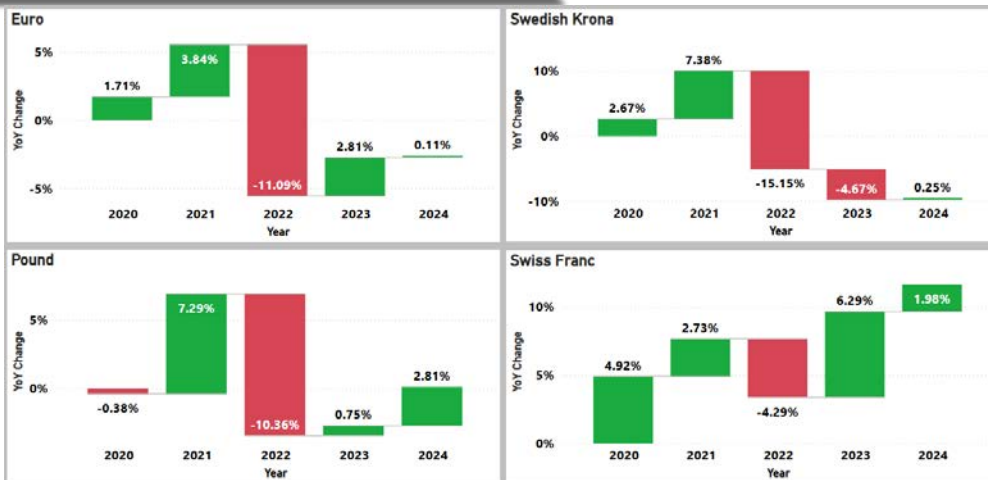
Currency Fluctuations vs US\$ - EMEA

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2024 saw continued recovery in EMEA

<https://www.irs.gov/individuals/international-taxpayers/yearly-average-currency-exchange-rates>



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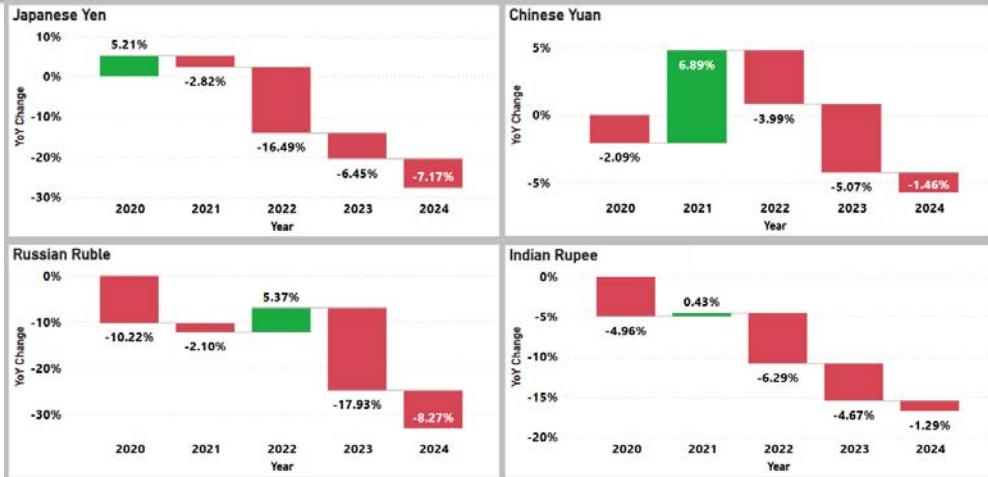
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Currency Fluctuations vs US\$ – AP



Currency in AP continued to drop

<https://www.irs.gov/individuals/international-taxpayers/yearly-average-currency-exchange-rates>



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Acquisitions in 2024 – S&A



Synopsys/Ansys & Siemens/Altair will change the landscape in 2025

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Simulation and Analysis		
Acquirer	Company	Technology
Altair	Cambridge Semantics	Graph databases
	Metrics Design Automation	EDA simulation
	Research in Flight	FlightStream®- (CFD) software
Ansys	Humanetics	leading provider of physical and digital human safety systems and sensor technologies
Cadence	BETA CAE	engineering simulation solutions
Keysight	Synopsys Optical Solutions group	Optical Solutions Group
	ESI	Simulation and Analysis
Siemens	Altair	Simulation and Analysis
Simulations Plus	Pro-ficiency	training and compliance solutions for clinical trial investigators and site staff
Synopsys	Ansys	Simulation and Analysis

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Acquisitions in 2024 – CAM



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

CAM		
Acquirer	Company	Technology
Nano Dimension	Desktop Metal	Additive
	Markforged	Additive
ModuleWorks	Celeritive Technologies	the developer of VoluMill
Sandvik	Almü Präzisions-Werkzeug	German cutting tools and solutions provider
	Suzhou Ahno	Chinese precision cutting tools

Acquisitions in 2024 – EDA



Electrification Intensifies

EDA		
Acquirer	Company	Comment
Clearlake Capital Group	Synopsys Integrity	the Software Integrity Group as application security testing software provider
Renesas	Altium	PCB Design Software Leader
Altium	Valispace	Systems and Requirements Engineering

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Acquisitions in 2024 - AEC



Digitalization increases

AEC		
Acquirer	Company	Technology
Autodesk	Payapps	construction payment and compliance management solutions
Bentley Systems	Cesium	3D geospatial company
Emerson	AspenTech	Plant Modeling & Simulation
Nemetschek	GoCanvas	digitizes field worker collaboration software that simplifies inspections, improves safety, and maximizes compliance

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Acquisitions in 2024 – SI/Reseller/VAR



Continued consolidation, increase on services at Resellers

SI/Reseller/VAR		
Acquirer	Company	Comment
Addnode	Prime Aerostructures	Dassault Systèmes Partner based in Vienna, Austria
Capgemini	D+I	product design and development consultancy in Australia
	Lösch & Partner	System Integrator application lifecycle management and systems engineering

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Acquisitions in 2024



Broad market

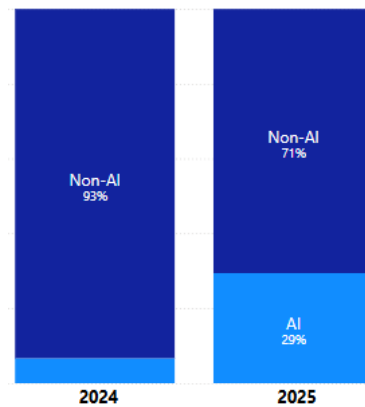
Other Notable Acquisitions		
Acquirer	Company	Comment
Autodesk	Datum360	Data connection tools for data connectivity
Bechtel	DriveWorks	Design Automation and Configure Price Quote (CPQ) solutions
ChapsVision	Sinequa	a global leader in AI-powered Enterprise Search
Francisco Partners	Jama Software	requirements management and traceability solution provider
Hexagon	Geomagic	CAD interoperability and scanning
	Itus Digital	asset performance management (APM) software
Tech Soft 3D	Actify	advanced CAD viewing and collaboration technology
	Theorem Solutions	CAD data translation and publishing

From “SaaS” & “Cloud” to AI



Press releases flooded with AI

- Acquisition Press Releases reflect industry M&A trends
- Traditionally SaaS and Cloud were trending
- In 2024 7% of PR titles mention “AI”
- In 2025 29% of PRs contain “AI” in Title
- AI strategy is essential to company valuation




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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



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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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PLM Market Categories



Three major segments comprise the PLM Market

- collaborative Product Definition management (cPDm)
 - 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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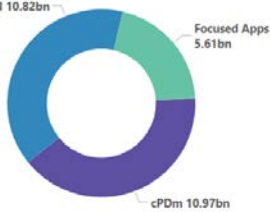


PLM Market Categories – Change for 2024

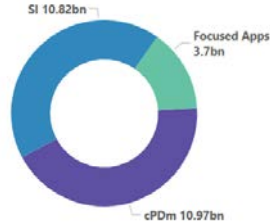

Moving ALM, IoT, & Requirements Management to Focused Applications

- Technologies increasingly meet the definition of cPDm
 - ALM (for embedded software)
 - IoT for enabling Digital Twin
 - Requirements Management
- Updated calculations enable visualization either way
- Expanded Focused Applications to be looked at for sub segmentation

Updated cPDm



Traditional cPDm



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Overall PLM Results



Growth in 2024 above forecast

- Overall PLM growth (9.6%) above forecast (8.6%)
- A strong year for CAD as major players get through the subscription transformation
- Comprehensive cPDM grew above forecast at 8.4% with marked strength in the consumer industries amid weakness in automotive
- Continued industry consolidation, new entrants, investor interest, and action
 - Many companies buying up their VARs
 - Major PLM players trying to differentiate, expand reach

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2024 Market Results



Comprehensive cPDM, Focused Applications, & SI/Reseller/VAR

Segment	2024 Revenues	YoY Growth
cPDM	\$25,485	9.0%
cPDM Comprehensive	\$10,966	8.4%
Focused Applications	\$3,700	12.0%
SI/Reseller/VAR	\$10,819	8.5%
Tools	\$52,940	10.0%
MCAD-Multi-Discipline	\$4,335	4.3%
MCAD-Design-Focused	\$4,851	7.9%
Non-Bundled CAM	\$1,901	6.6%
Simulation & Analysis	\$10,910	8.8%
Other Tools (e.g., ALM)	\$1,915	7.2%
EDA	\$19,246	13.0%
AEC	\$9,784	10.6%
Digital Manufacturing	\$1,043	8.5%
Total	\$79,468	9.6%

Traditional
cPDM

Revenue in Millions

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2024 Market Results – Inclusive of Other Tools



Comprehensive cPDM, Focused Applications, SI/Reseller/VAR, & Other Tools

Segment	2024 Revenues	YoY Growth
cPDM	\$27,400	8.8%
cPDM Comprehensive	\$10,966	8.4%
Focused Applications	\$3,700	12.0%
Other Tools (e.g., ALM)	\$1,915	7.2%
SI/Reseller/VAR	\$10,819	8.5%
Tools	\$51,026	10.1%
MCAD-Multi-Discipline	\$4,335	4.3%
MCAD-Design-Focused	\$4,851	7.9%
Non-Bundled CAM	\$1,901	6.6%
Simulation & Analysis	\$10,910	8.8%
EDA	\$19,246	13.0%
AEC	\$9,784	10.6%
Digital Manufacturing	\$1,043	8.5%
Total	\$79,468	9.6%

Updated
cPDM

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Revenue in Millions

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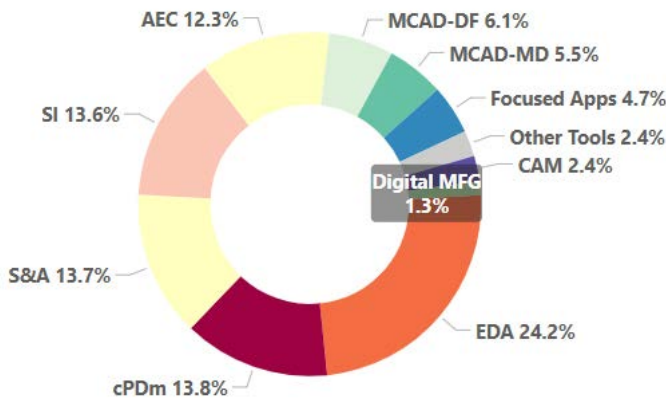
PLM Investments by Segment

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Market grew by 9.6% to US\$79.5B in 2024

Revenues presented are CIMdata estimates



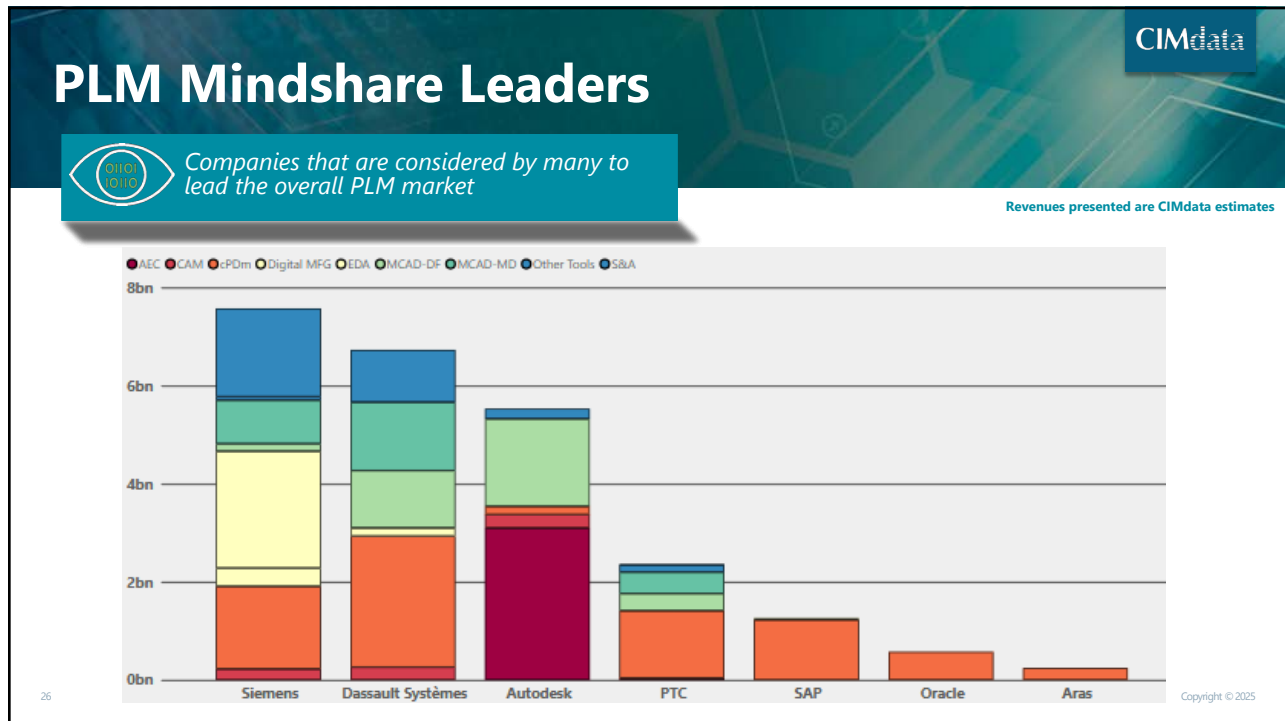
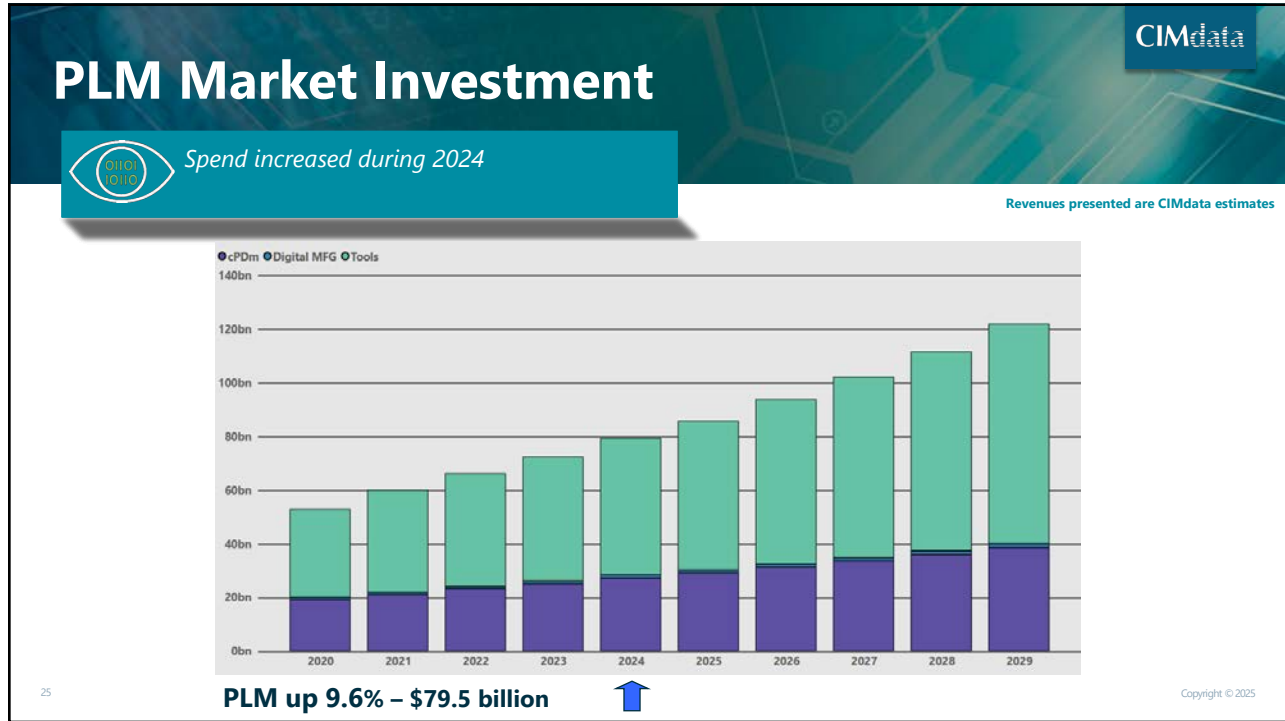
AEC	9,783,637,549
CAM	1,900,839,532
cPDM	10,965,909,912
Digital MFG	1,042,692,073
EDA	19,246,137,054
Focused Apps	3,700,207,363
MCAD-DF	4,850,552,557
MCAD-MD	4,334,548,493
Other Tools	1,914,579,902
S&A	10,909,971,764
SI	10,819,304,980
Total	79,468,381,177

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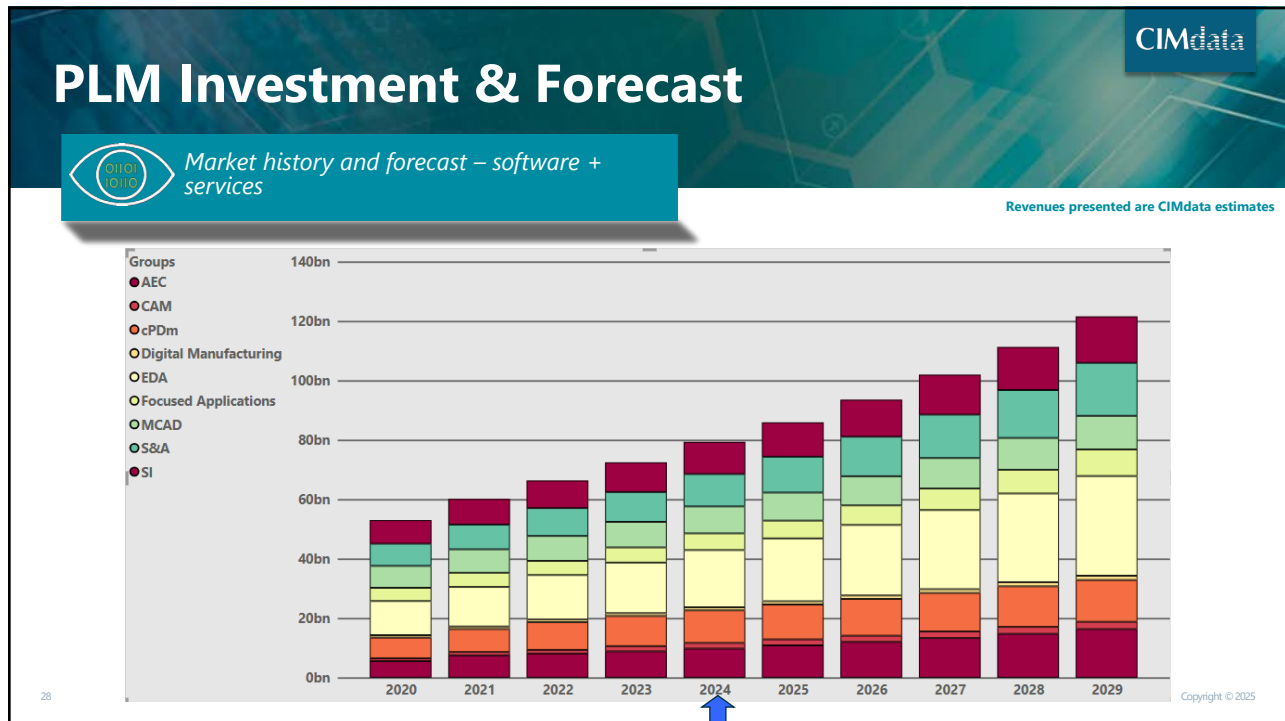
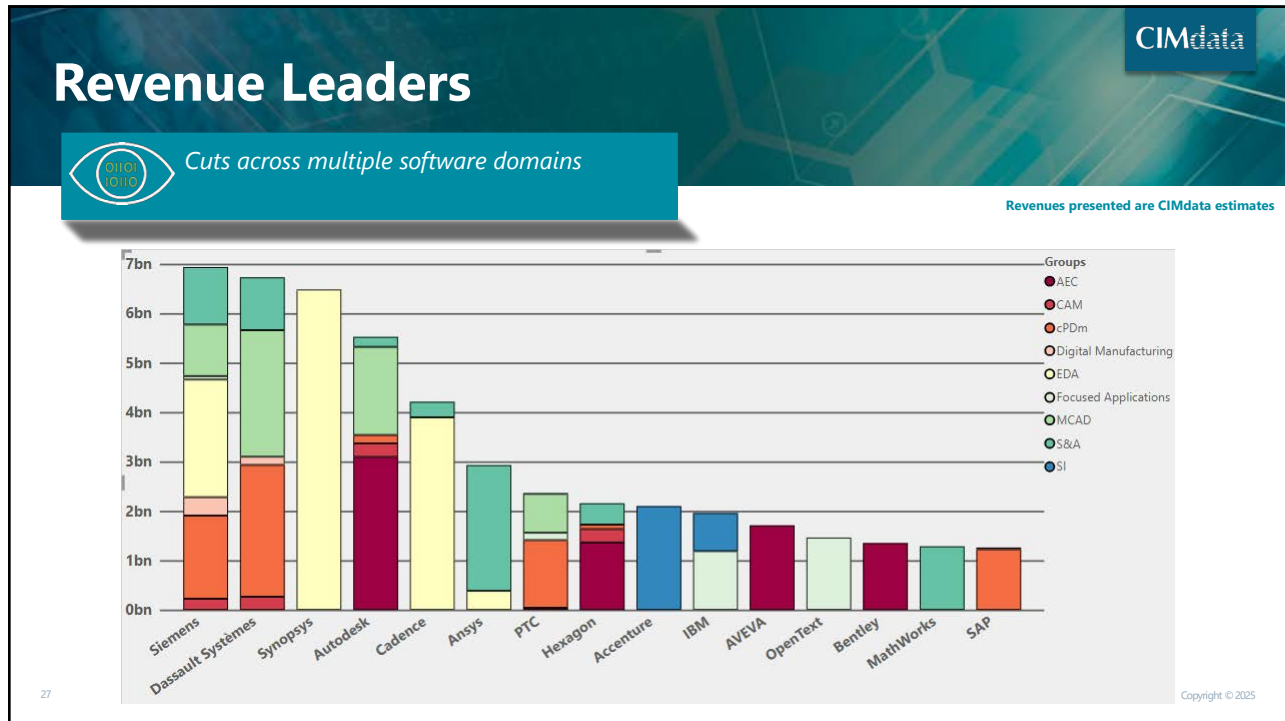
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PLM Market in 2024



Trends strong, economic headwinds ahead

- AI Driving adoption of platforms & opportunities for services
- American trade policies creating global economic uncertainty
- Move to SaaS accelerated market growth
- Still seems to be appetite for M&A
- Industrial automation companies seeing more opportunities in software
- CIMdata believes the market still has a lot of potential
 - Industry 4.0, digital thread creating strong pull for software and services

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Market Forecasts – Inclusive of Other Tools



Comprehensive cPDM, Focused Applications, SI/Reseller/VAR & Other Tools

Segment	2025 Estimate	YoY Growth	5 Year CAGR
cPDM	\$29,269	6.8%	7.1%
cPDM Comprehensive	\$11,742	7.1%	5.1%
cPDM-Focused Applications	\$3,882	4.9%	9.6%
Other Tools (e.g., ALM)	\$2,105	10.0%	10.3%
SI/Reseller/VAR	\$11,540	6.7%	7.6%
Tools	\$55,827	9.4%	10.1%
MCAD-Multi Discipline	\$4,522	4.3%	3.7%
MCAD-Design Focused	\$5,180	6.8%	7.7%
Non-Bundled CAM	\$2,015	6.0%	5.3%
Simulation & Analysis	\$12,076	10.7%	10.3%
EDA	\$21,168	10.0%	11.8%
AEC	\$10,866	11.1%	10.8%
Digital Manufacturing	\$1,091	4.7%	6.8%
Total	\$86,188	8.5%	9.0%

Revenue in Millions

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

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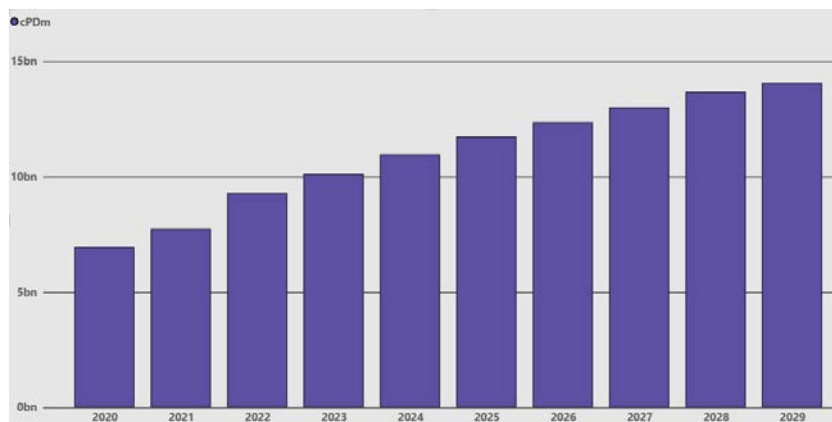
2024 cPDM Revenue

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Five-year CAGR estimate = 5.1%

Revenues presented are CIMdata estimates

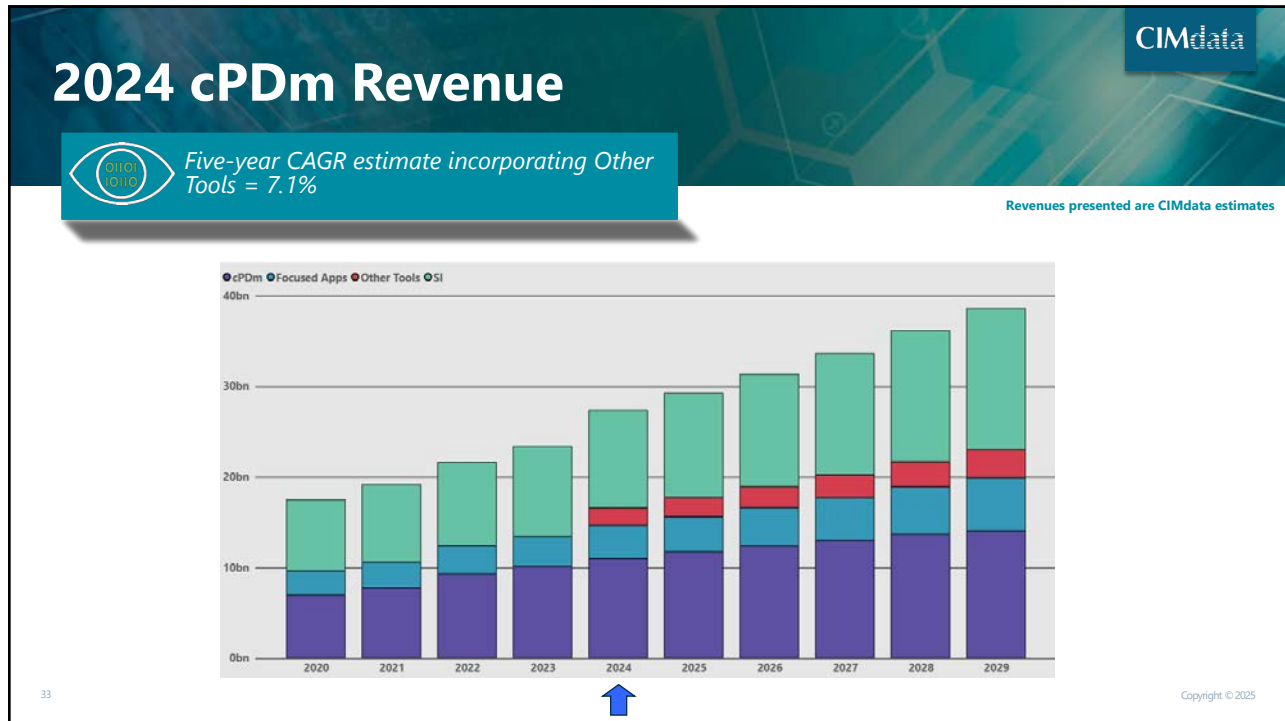


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Revenue Ratios – Software vs. Services

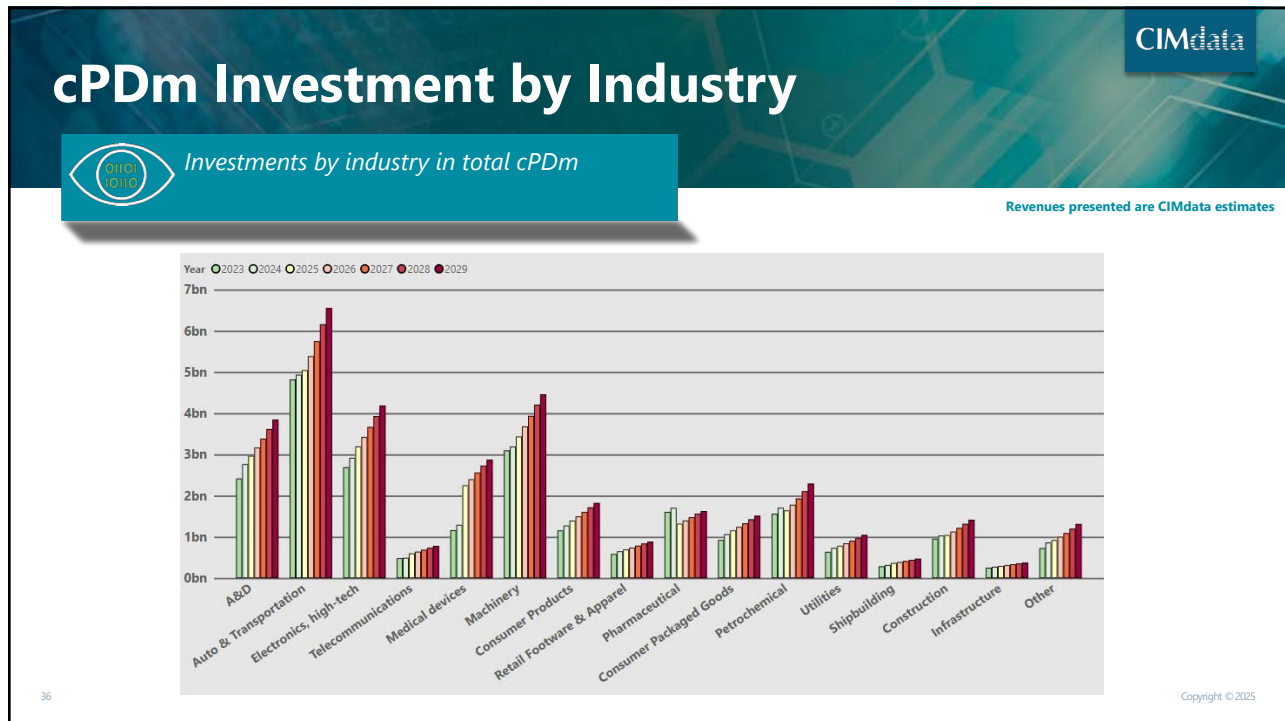
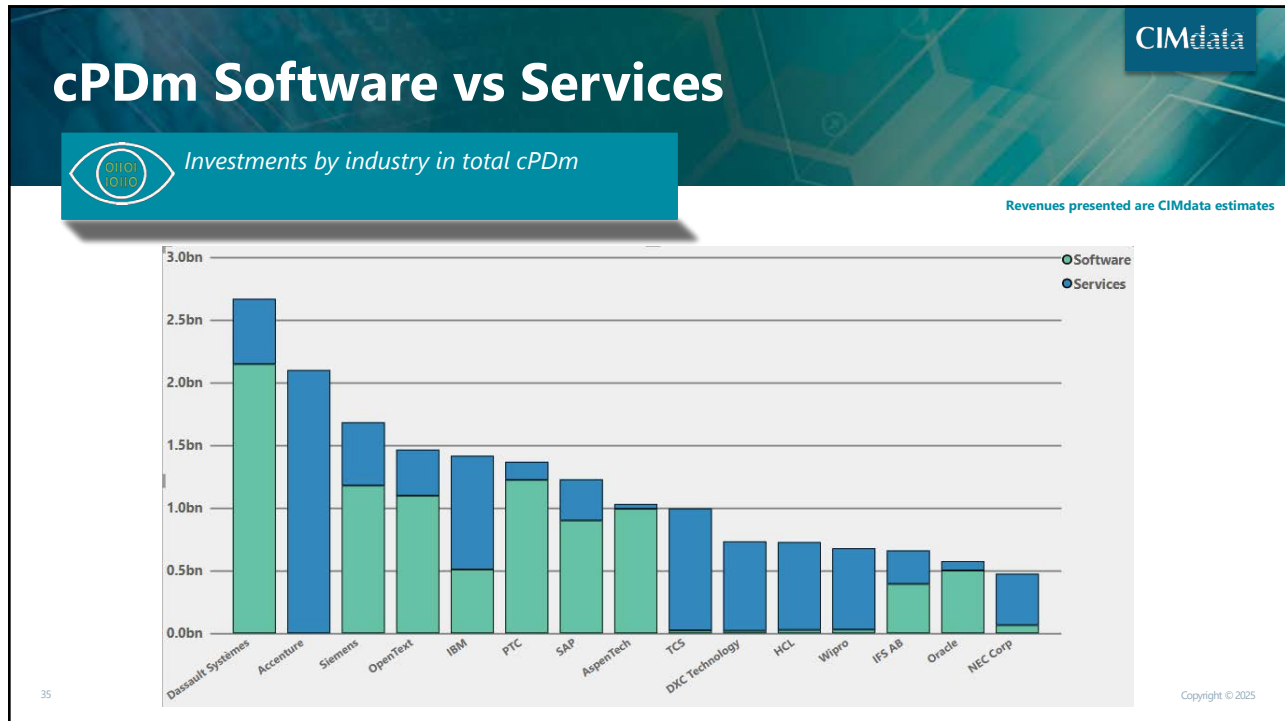
Services is a major revenue area

- Overall Total cPDm market: services are 50% Driven by independent services providers
- Comprehensive cPDm providers only
 - In 2024, Software was 74.7% in increase
 - In 2023, Software was 73.9%
- Services ratio can change for several reasons
 - PLM solution providers developing products, packaging, and delivery bundles to reduce services
 - Cloud-based products often claim to require less services, really just different types
 - Nature of services changing – more need for skills in advanced PLM topics vs. IT installation and integration

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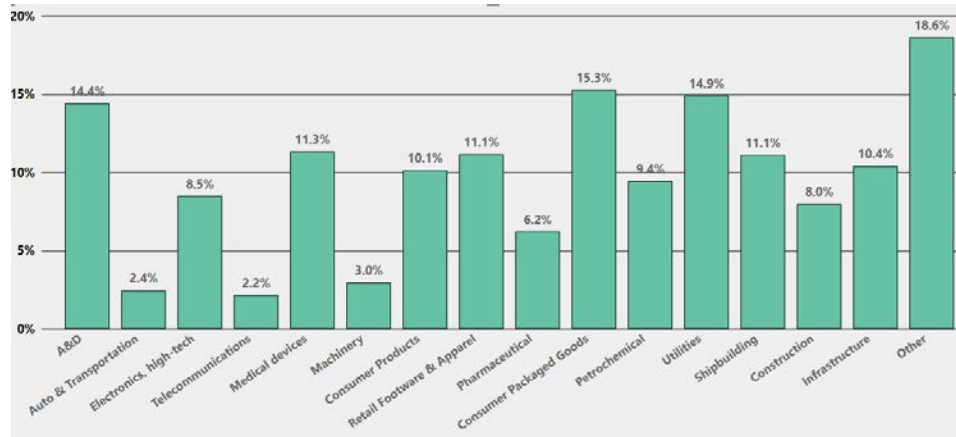
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cPDM YoY Change



YoY change for comprehensive cPDM, Focused Applications, & SI/Reseller/VAR



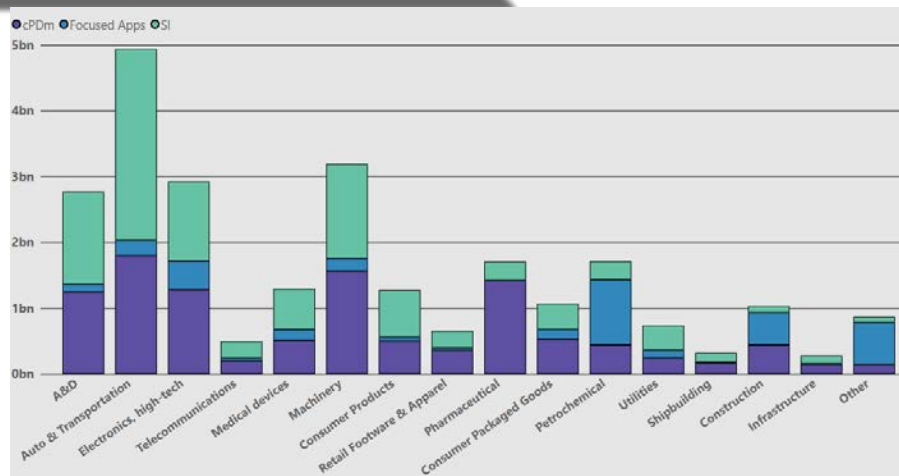
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Industry Breakdown of cPDM



For comprehensive cPDM, Focused Applications & SI/Reseller/VAR

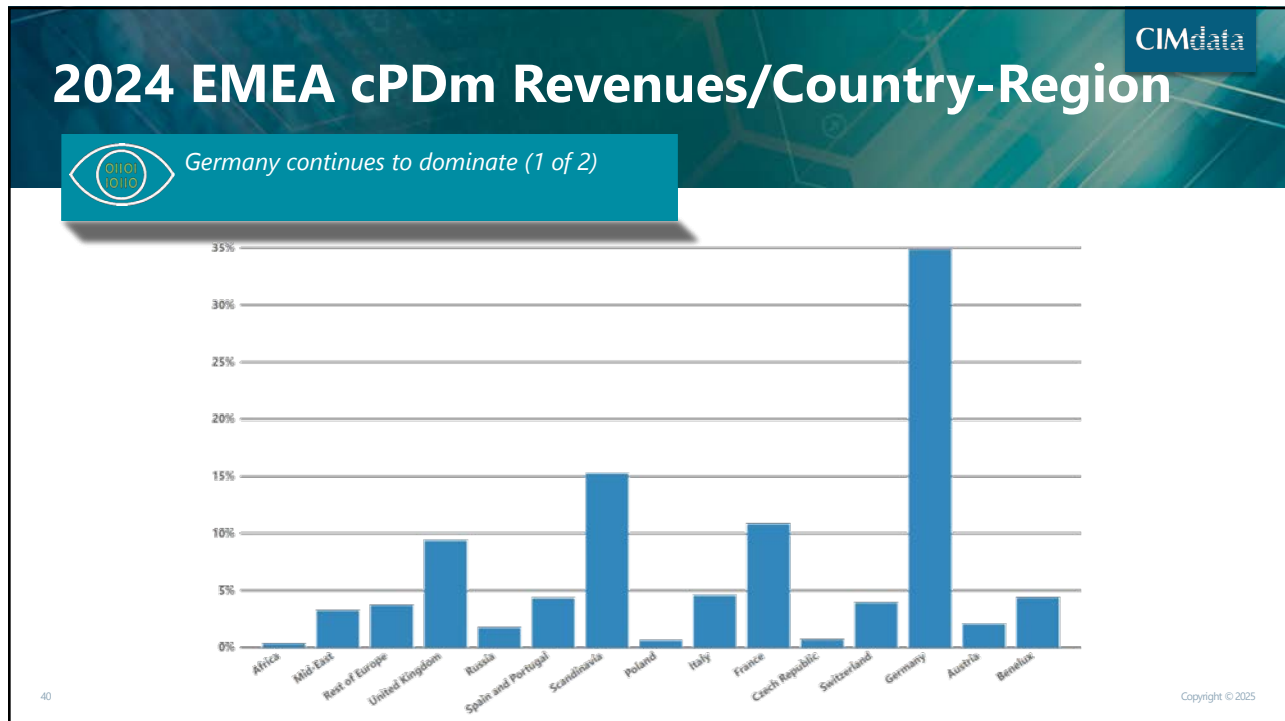
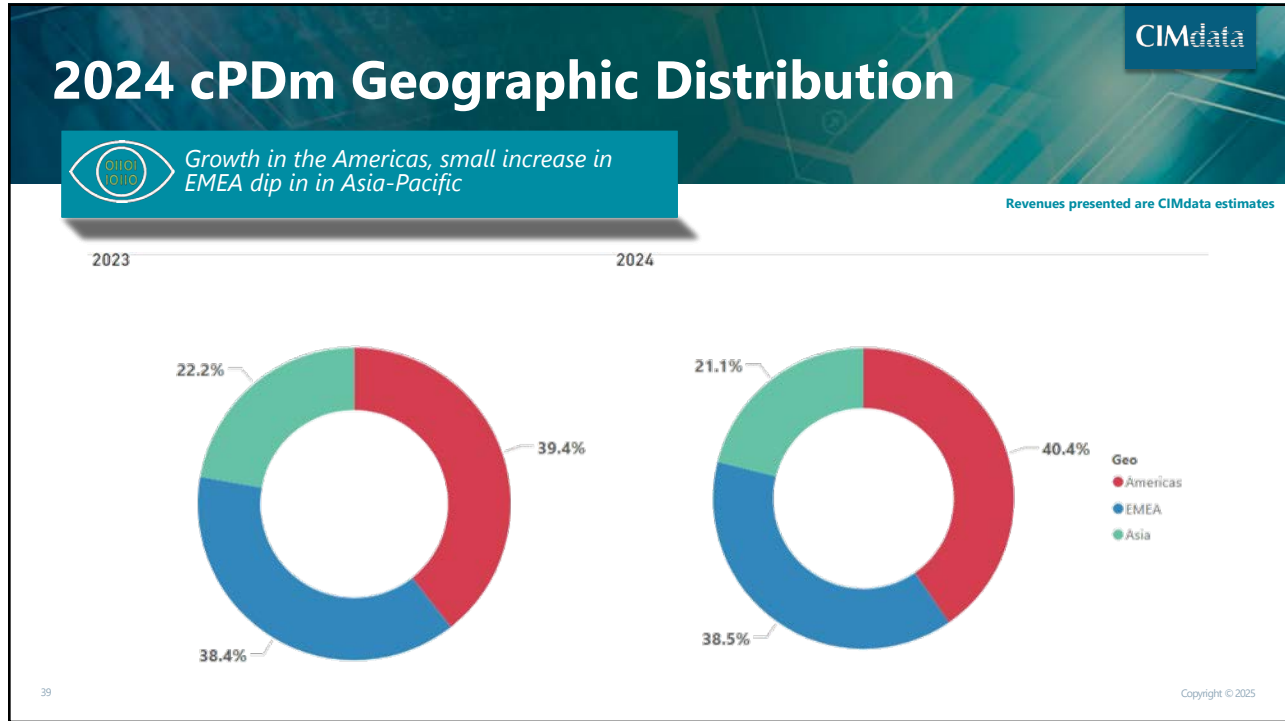


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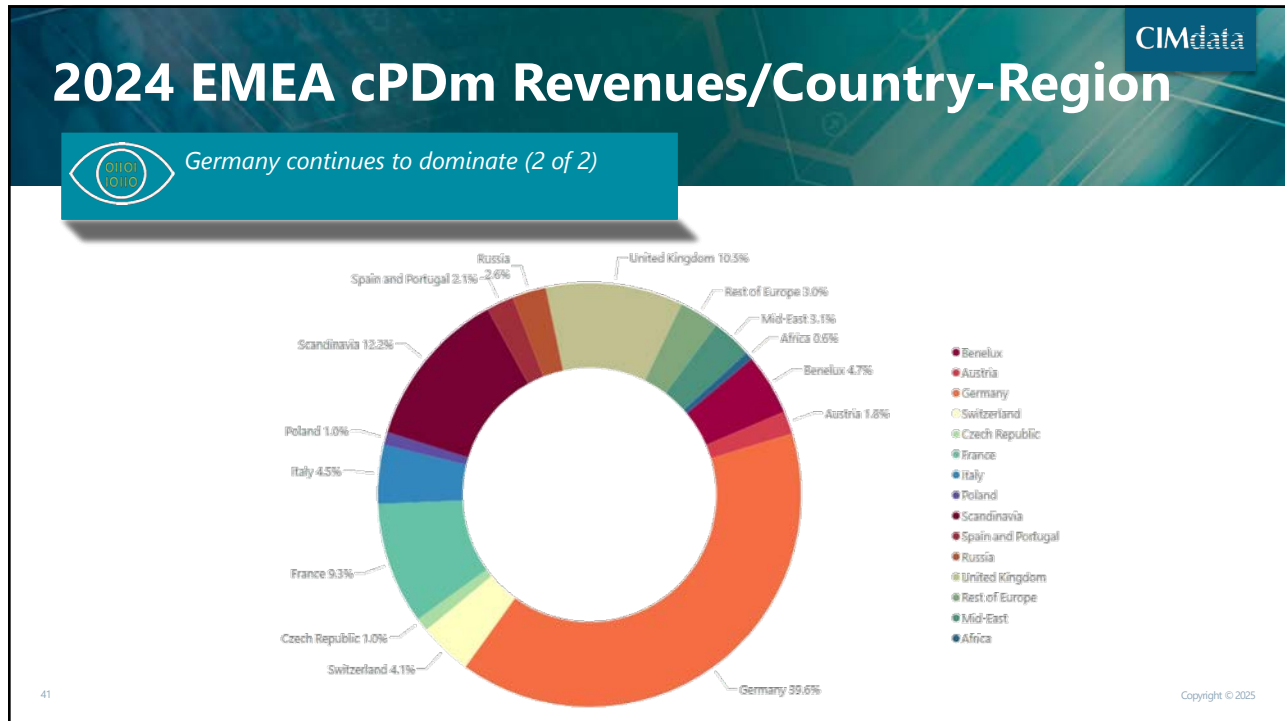
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PLM Mindshare Leaders



Who do people think about?

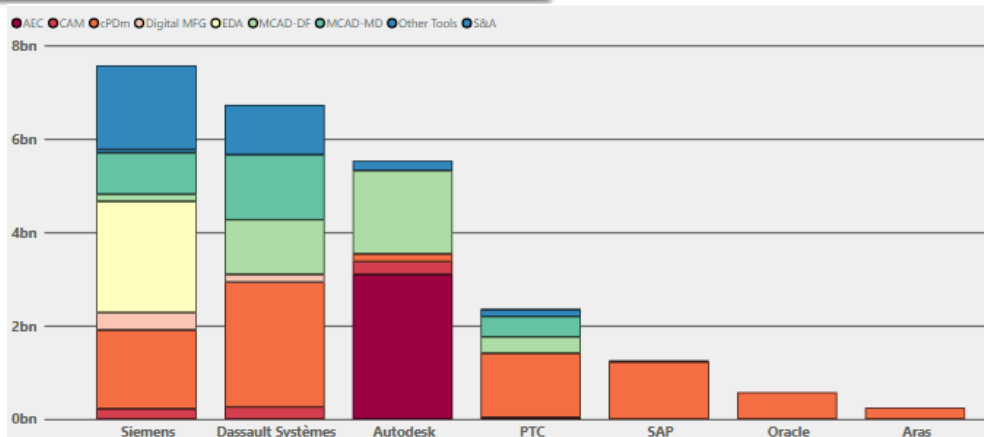
- These companies are perceived as leading the market
 - Number, size, and scope of implementations
 - Technology and thought leadership
- All are comprehensive, lifecycle-focused providers
 - Some were leaders in the PDM market
 - Some also provide tools – primarily MCAD and S&A
- Are developing broad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

2024 PLM Mindshare Leaders Revenue



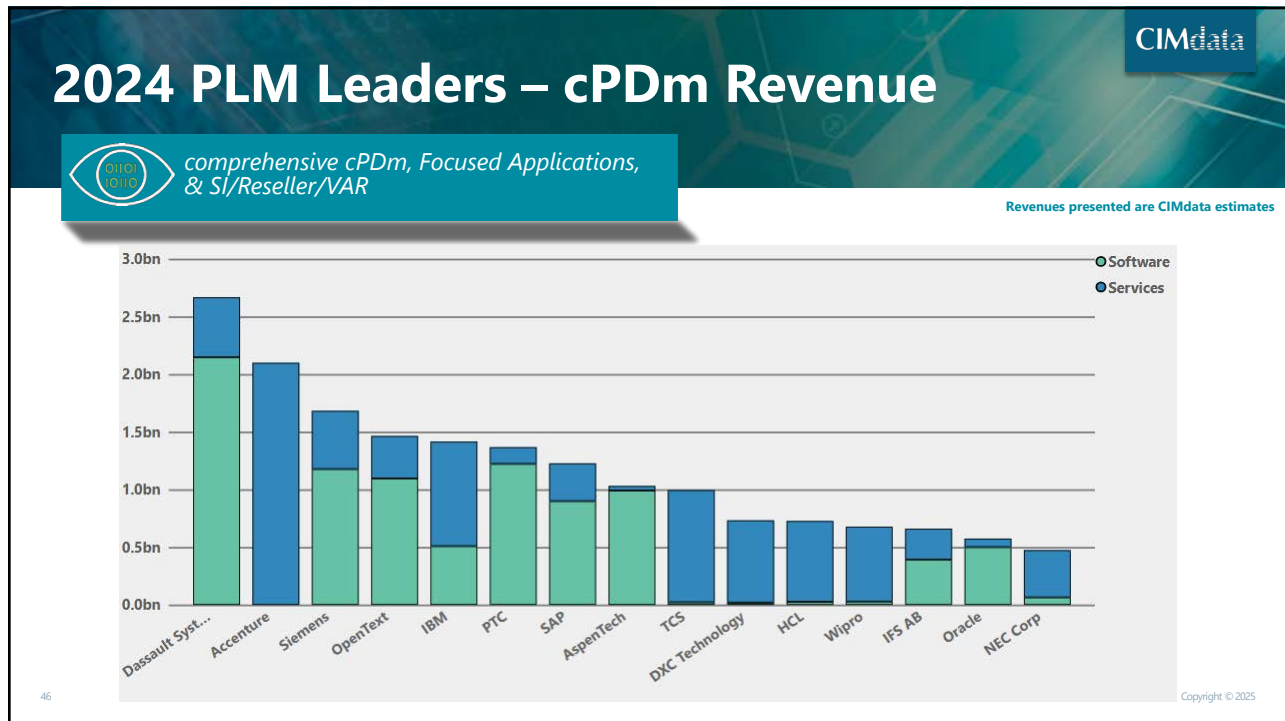
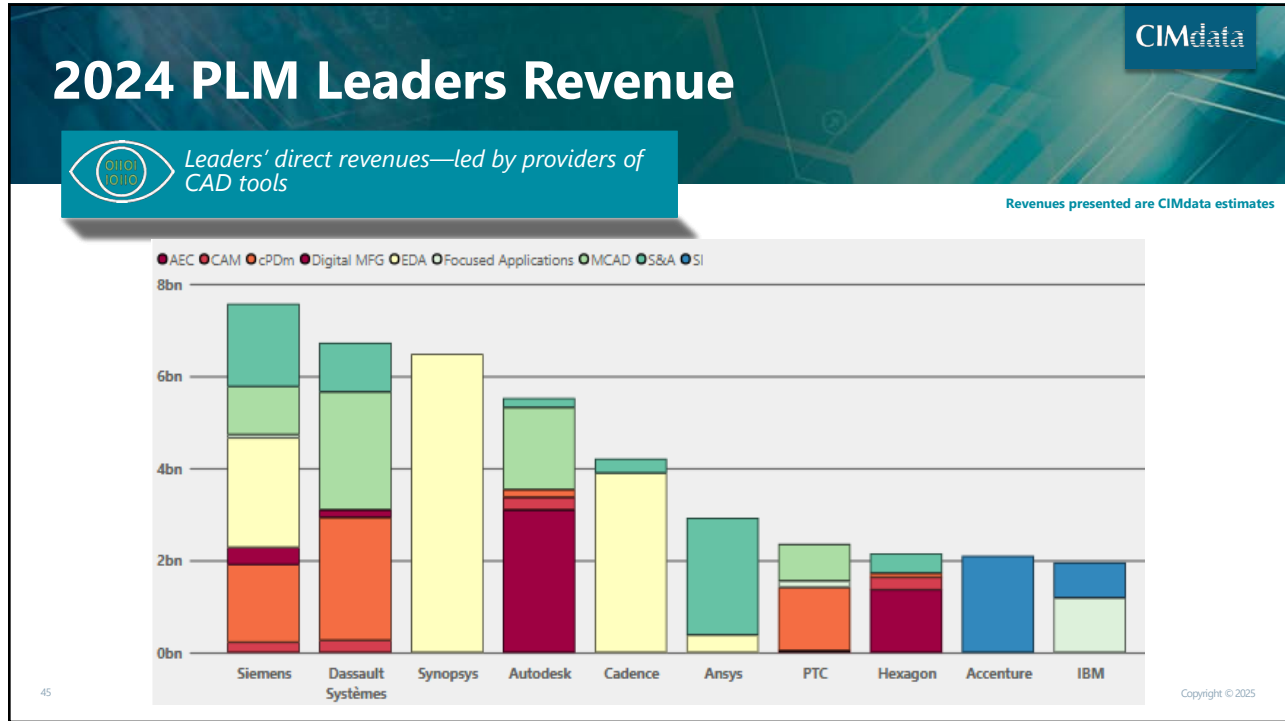
Leaders' direct revenues—led by providers of CAD tools

Revenues presented are CIMdata estimates



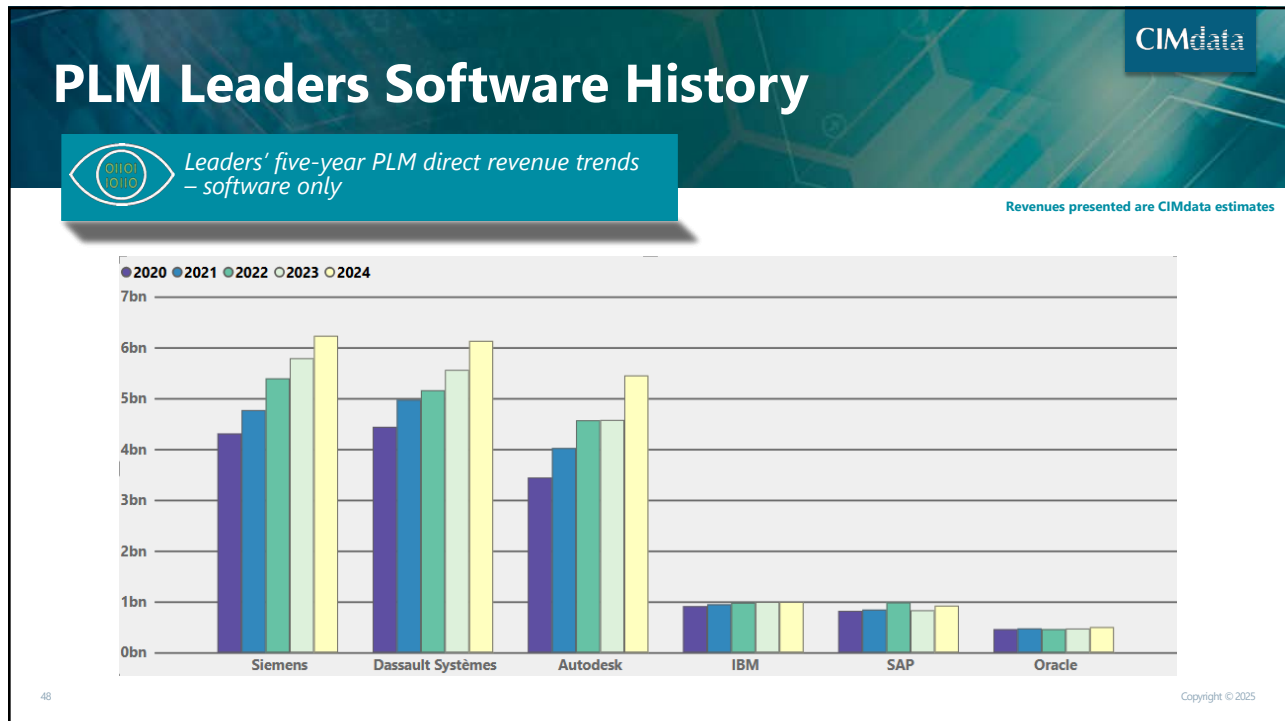
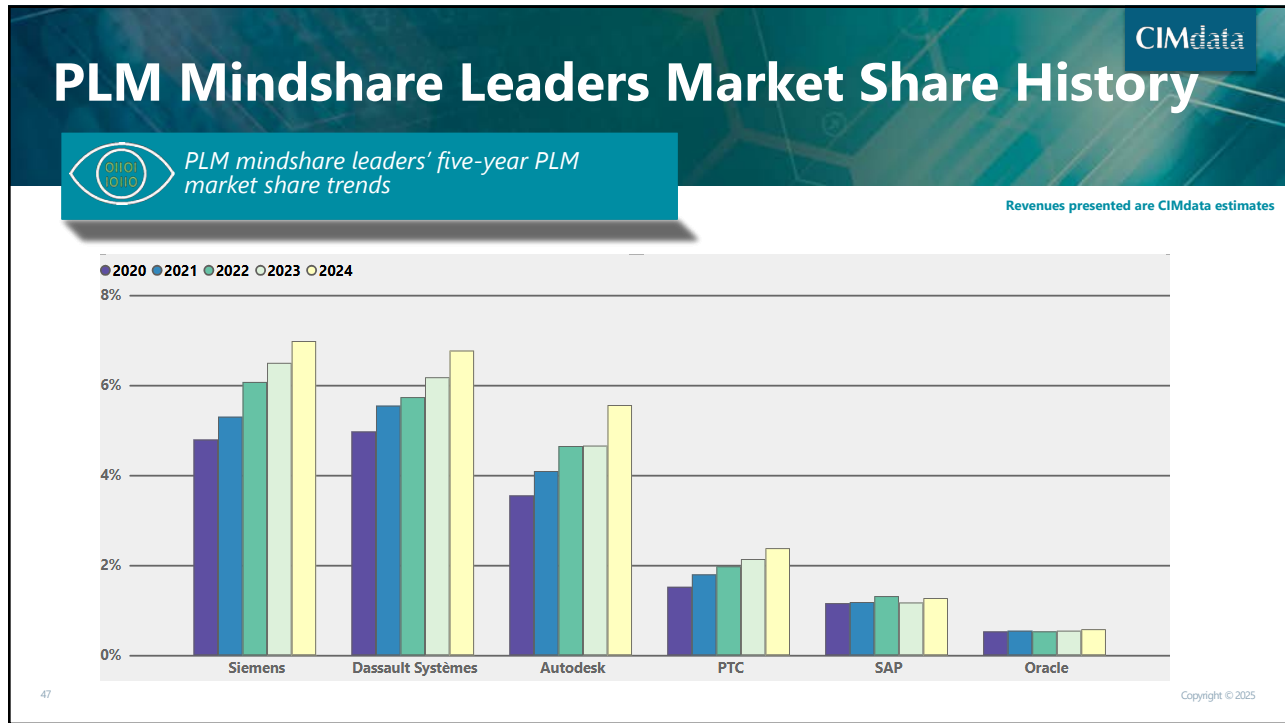
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Overall PLM Market Revenue Leaders



The market leaders are a diverse group

- Several are focused on specific technologies or industries
- Some have multiple lines of business
- Some are partners of multiple other providers
- Many are not competitors
- Seventeen companies over \$1B in revenue (was 13 in 2021)
 - 2 EDA
 - 5 AEC
 - 3 Comprehensive cPDm
 - 1 SI/Reseller/VAR
 - 2 S&A
 - 2 Focused cPDm
 - 2 Broad portfolio

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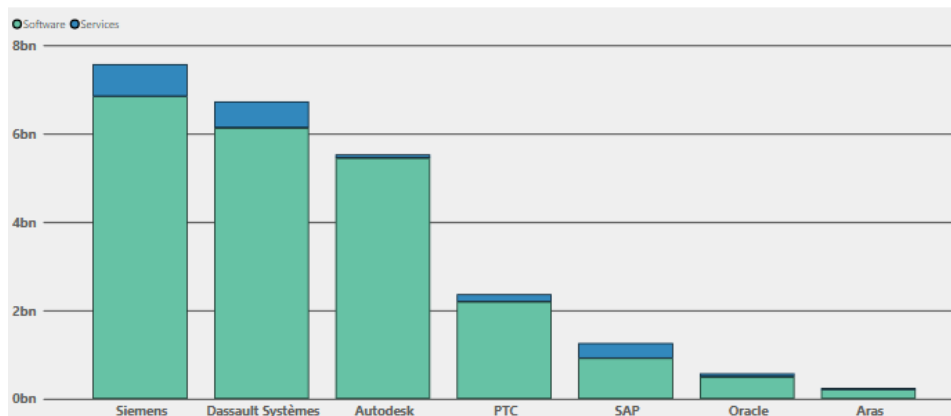
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2024 PLM Mindshare Leaders – Revenue



Overall Software & Services for Mindshare Leaders

Revenues presented are CIMdata estimates

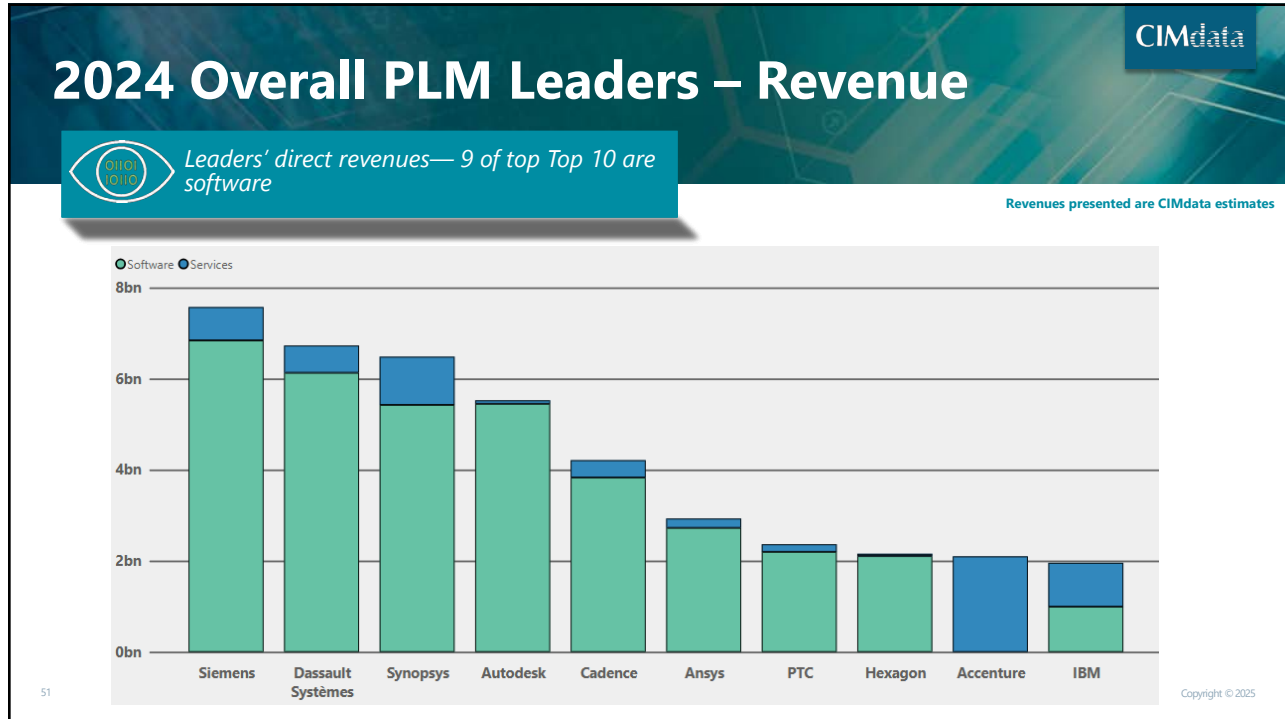


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Scope of Services Continues to Evolve

As ISVs move to Direct sales competition for service accelerates

- Companies look to integrate digital thread to take advantage of AI
 - PLM expansion areas require deployment skills not normally available in-house – driving use of external expertise
 - Cloud – cloud-to-cloud, cloud-to-on-premise interconnection
 - IoT data will have to be analyzed, with results fed back to multiple systems
- As ISVs move to Direct sales competition for service accelerates

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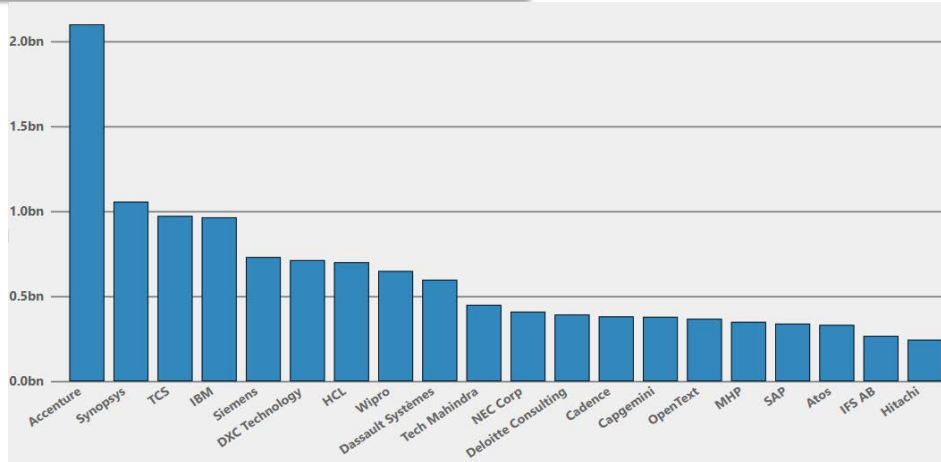
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2024 PLM Services Revenue Leaders



Changes in the services organizations of leading PLM solution providers

Revenues presented are CIMdata estimates



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Comprehensive cPDM Provider Analysis



Review of cPDM provider revenue performance

- Comprehensive segment dominated by “mindshare” leaders
 - Aras, Dassault Systèmes, Oracle, PTC, SAP, and Siemens
- Other major providers
 - IBM, IFS, and Infor, and Aras
 - NEC focused on Japan
- New providers continue to emerge
 - Continuing the expansion
 - Cloud-native providers are proliferating (Ganister, JWI, Bild, OpenBOM, etc.)
 - Local providers are expanding, particularly in China

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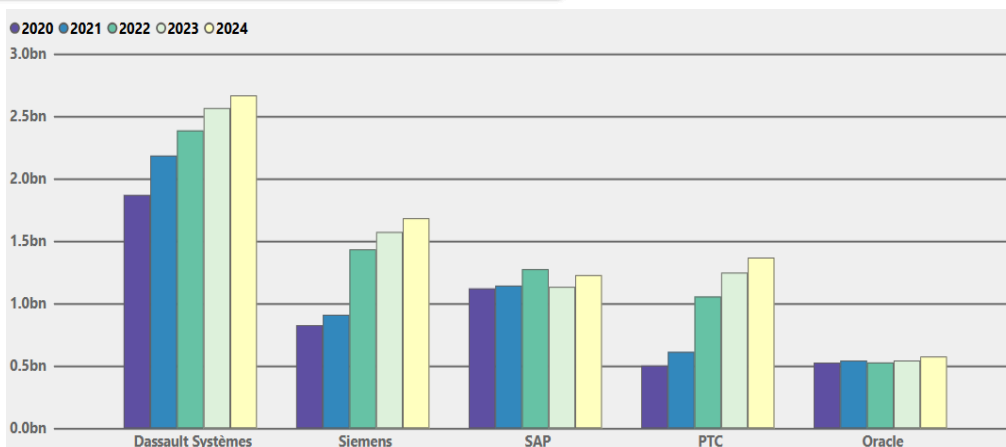
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Comprehensive cPDM Leaders Revenue



Leaders' five-year cPDM direct revenue trends

Revenues presented are CIMdata estimates

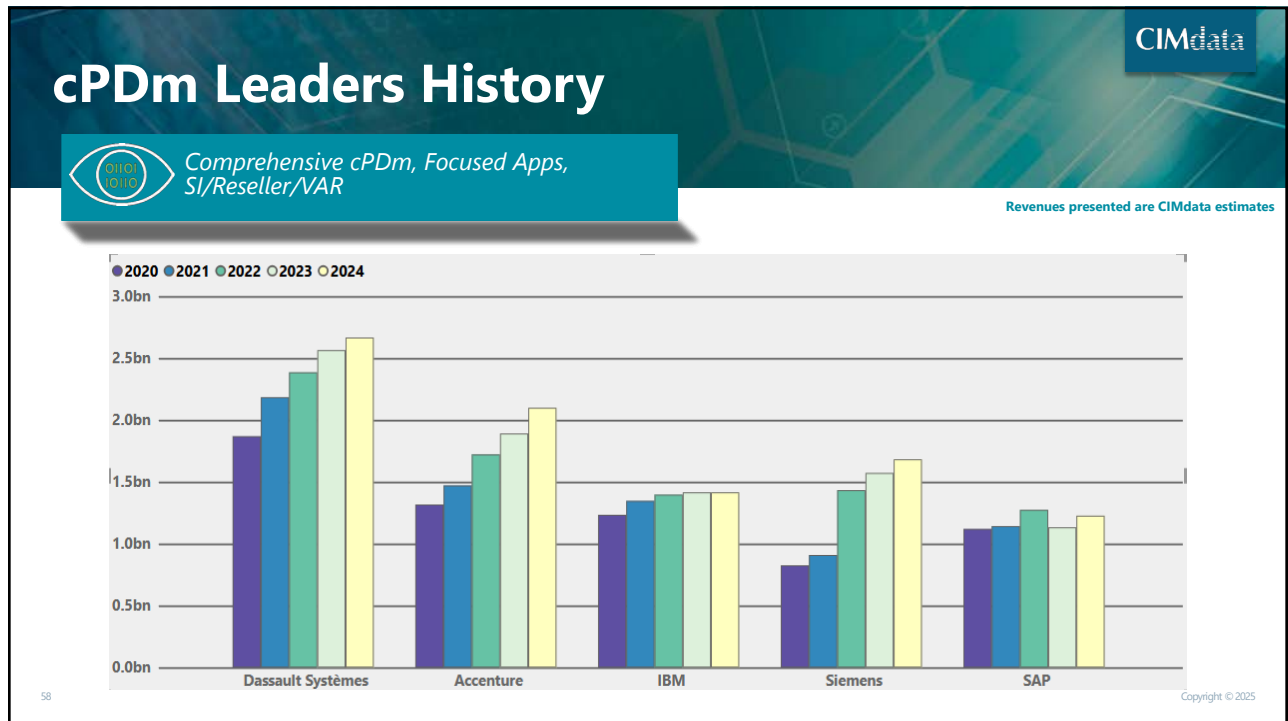
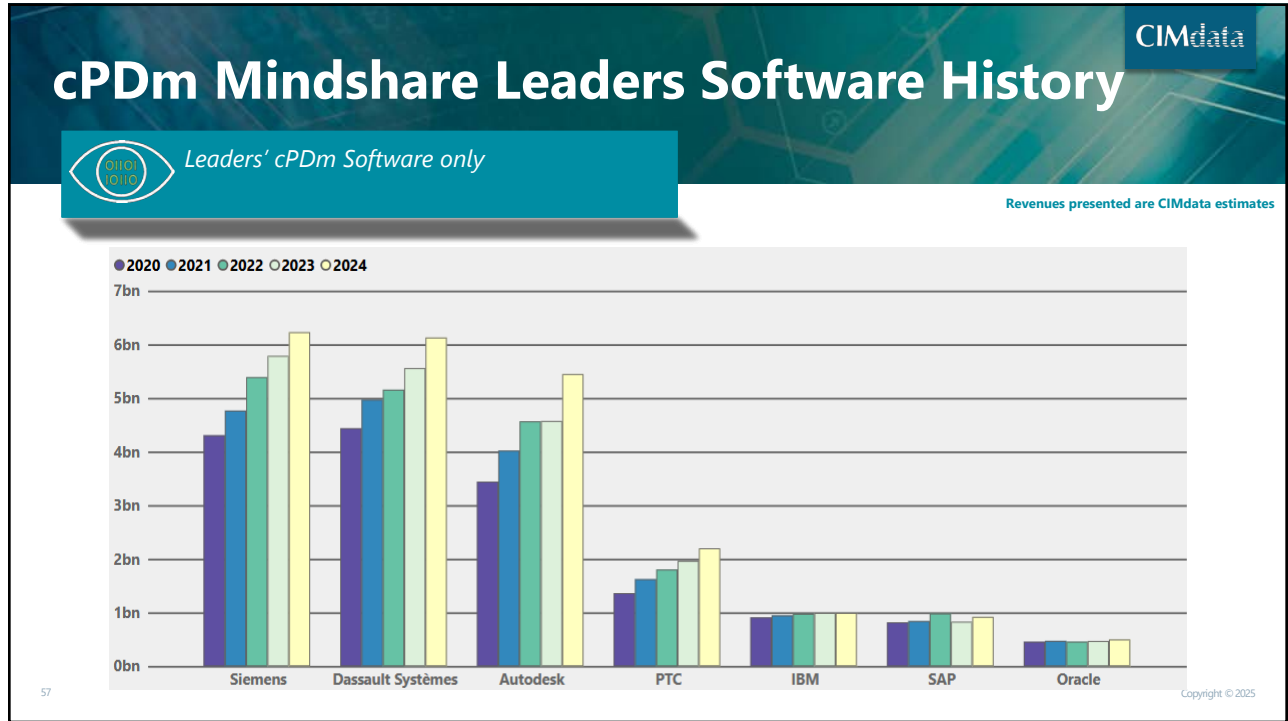


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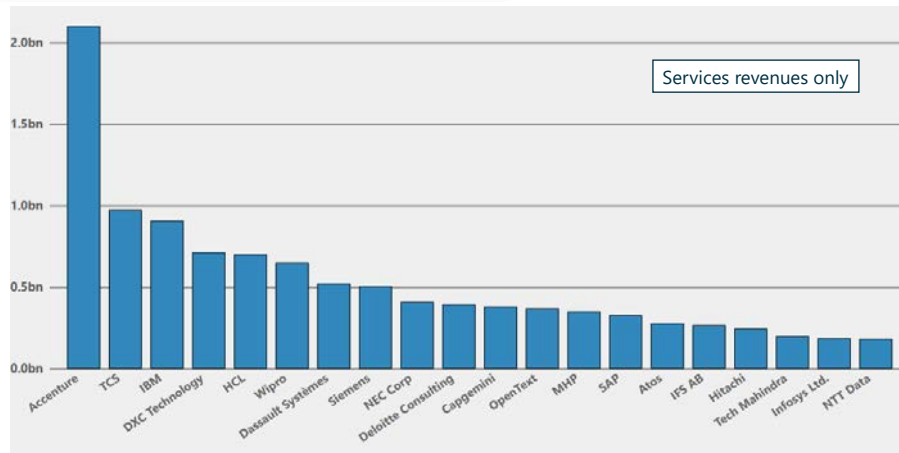
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2024 cPDM Overall Services Leaders



Comprehensive providers have growing services organizations

Revenues presented are CIMdata estimates



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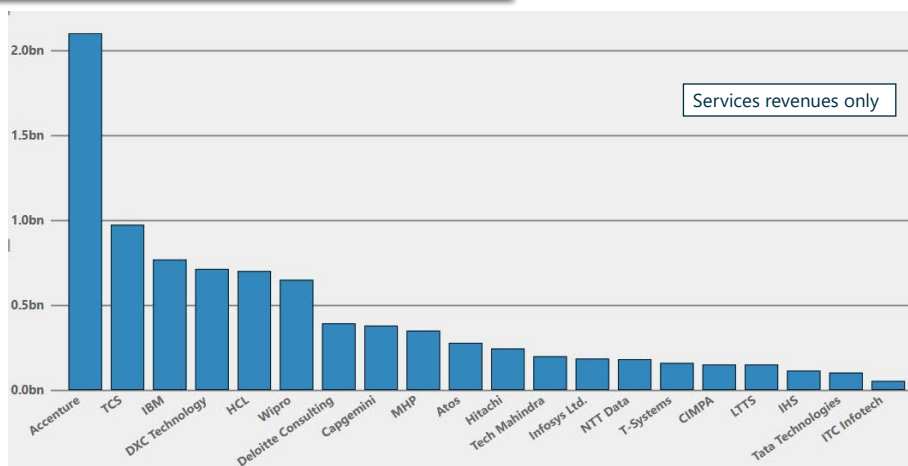
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2024 cPDM Independent Services Leaders



cPDM independent services continue to grow

Revenues presented are CIMdata estimates



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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
 - Wide variety of portfolio types
 - Some partner on selected accounts
- Service providers continue to grow
 - Both organically and through acquisitions
 - Resellers are quickly becoming SI's

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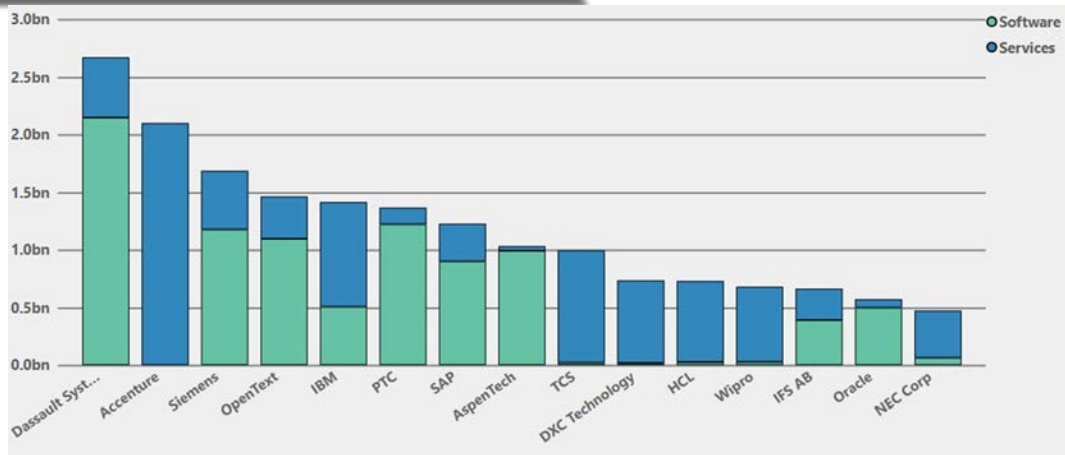
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Overall, 2024 cPDM Revenue Leaders



Services are a major factor in overall revenue

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Software includes one-time payments (paid licenses) plus recurring fees – right to use, subscriptions, maintenance

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Comments on Tool Segments



Will be some impact from conflict in Ukraine

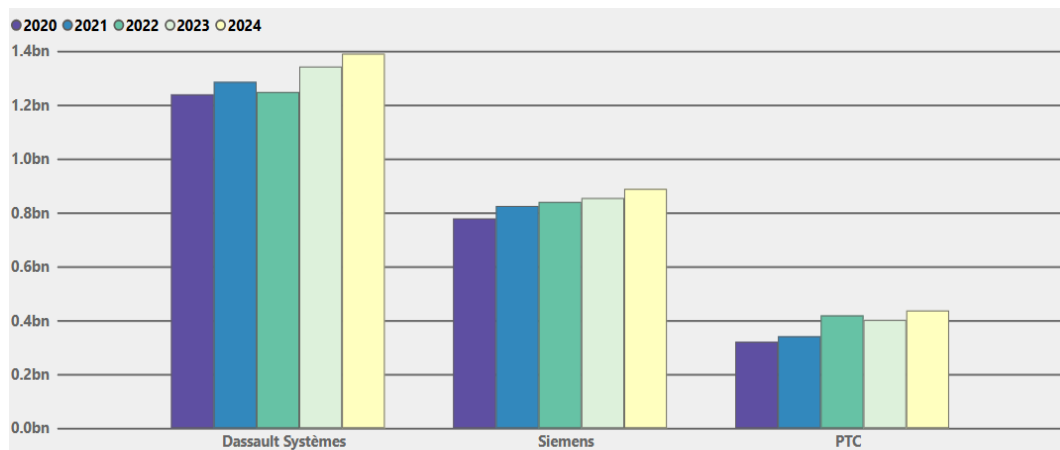
Segment	Comments
MCAD-MD	Multi Disciplinary is increasingly cannibalized by design focused but still strong in certain industries
MCAD-DF	The transition to subscription is increasing growth rapidly
CAM	A bit stronger growth in 2024, expect high end of historical 5-7% range
S&A	Significant M&A activity in market leaders, trends driving growth will remain strong
EDA	Strong year despite challenges from major providers
AEC	Increasing digitalization continues strong demand and offering opportunities for startups
Focused Applications	Several sub segments are growing rapidly such as visualization, requirements management, and embedded ALM for integrated software

MCAD Multi-Discipline



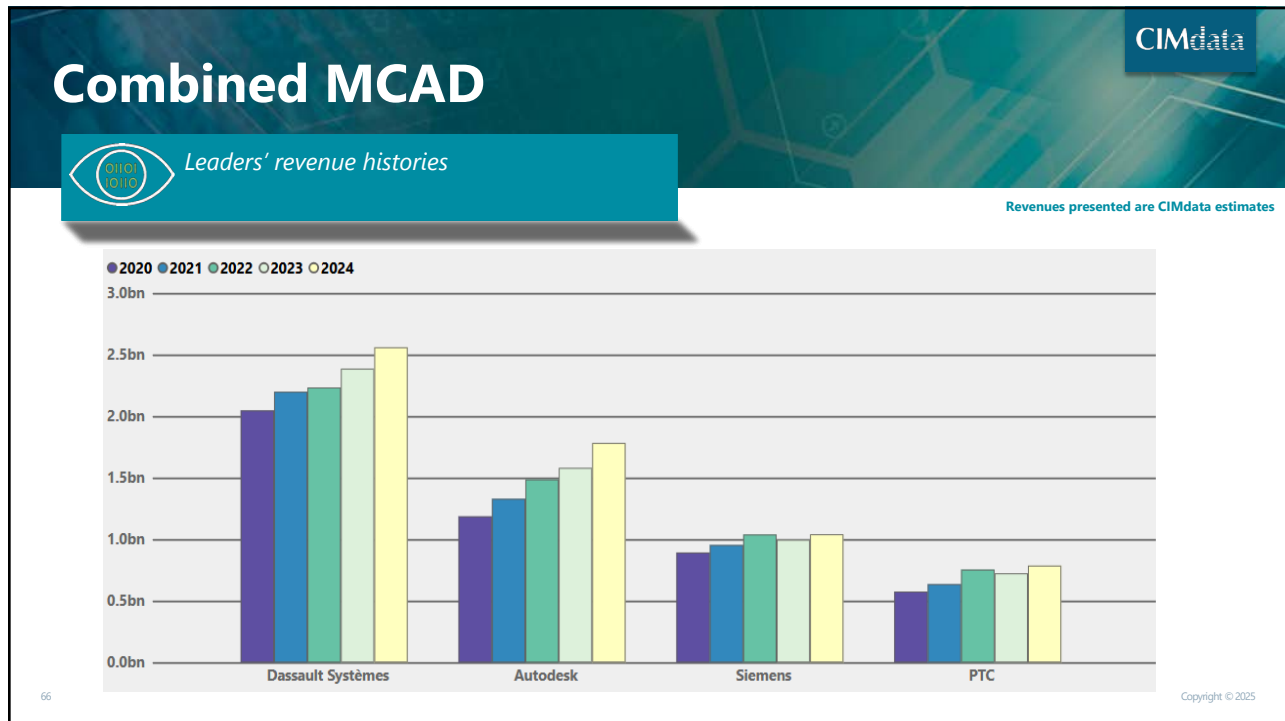
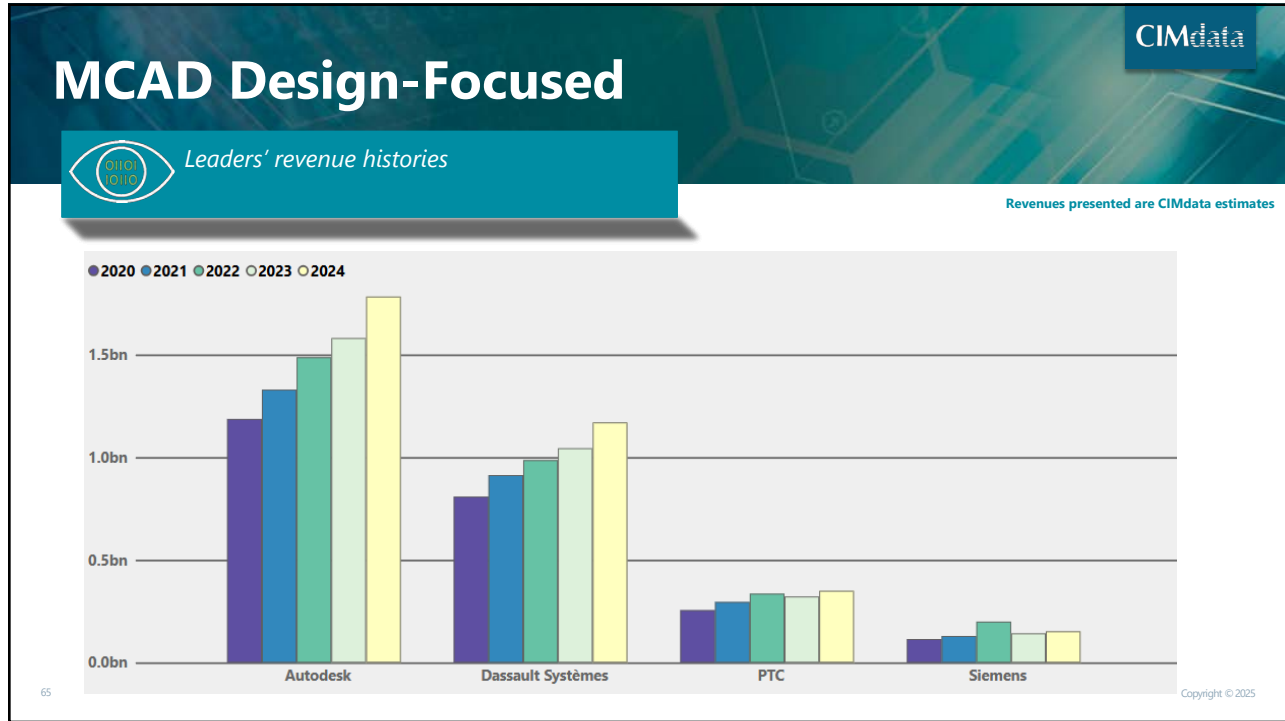
Leaders' revenue histories

Revenues presented are CIMdata estimates



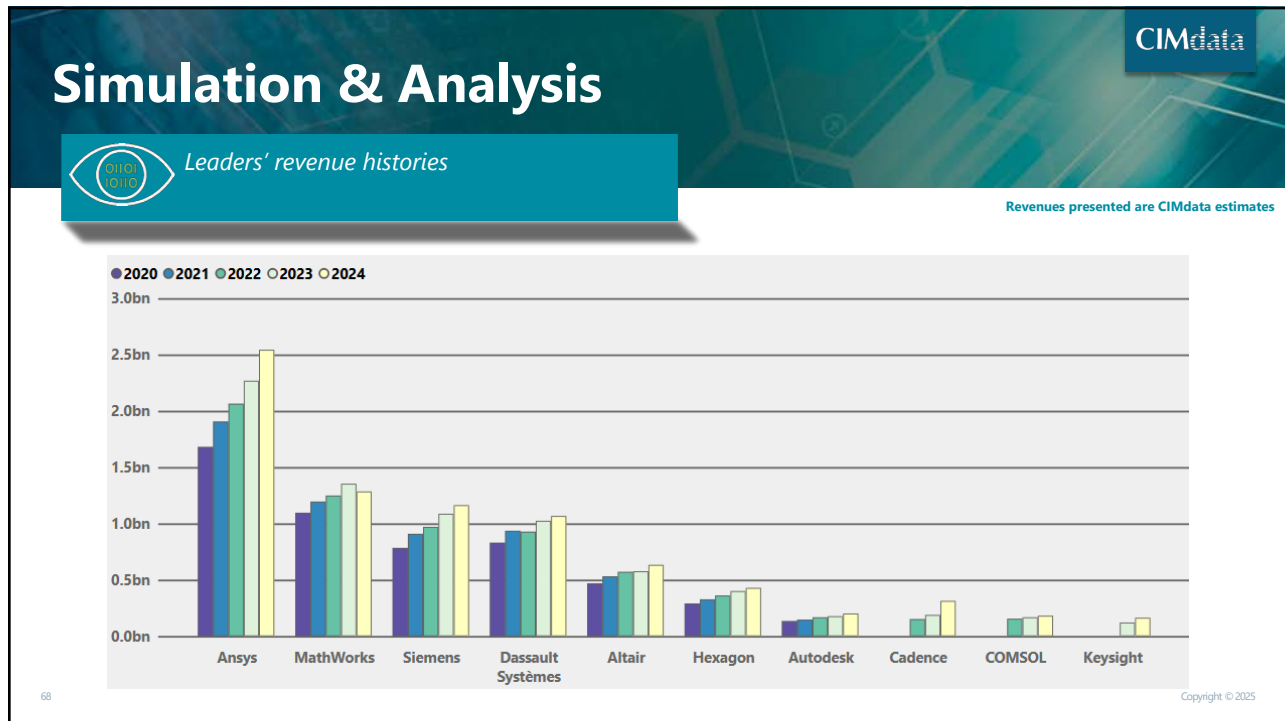
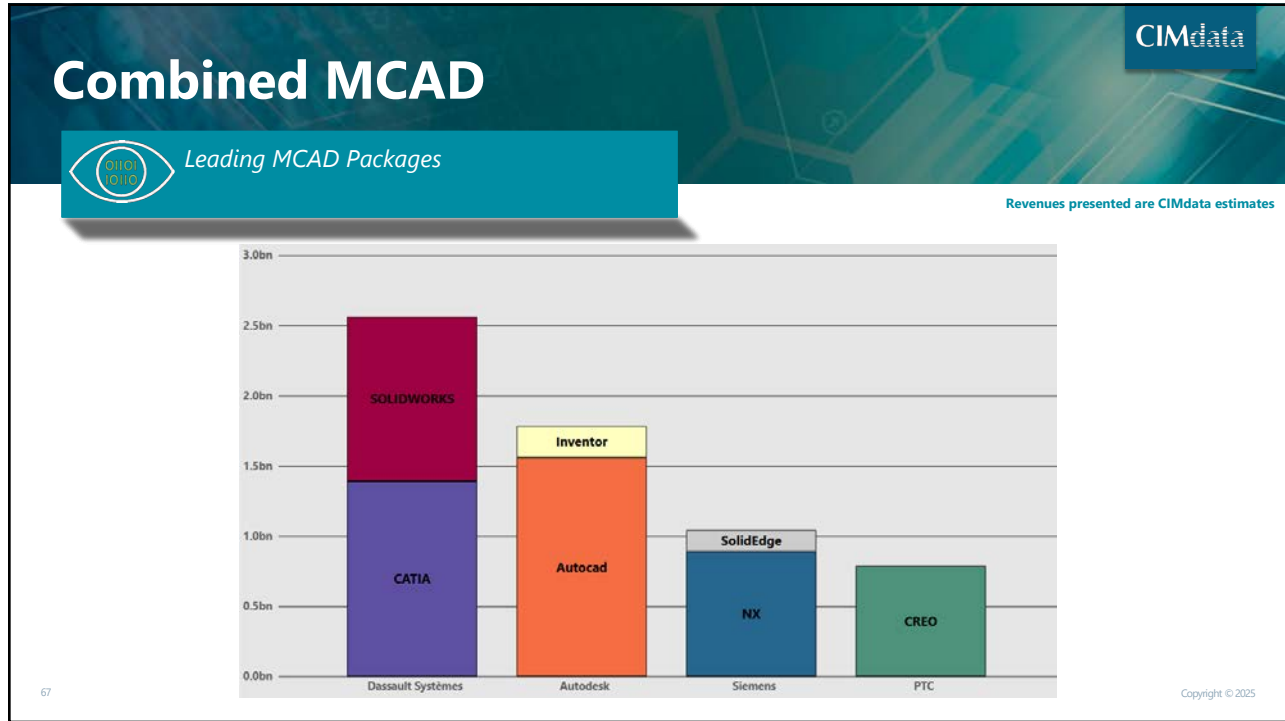
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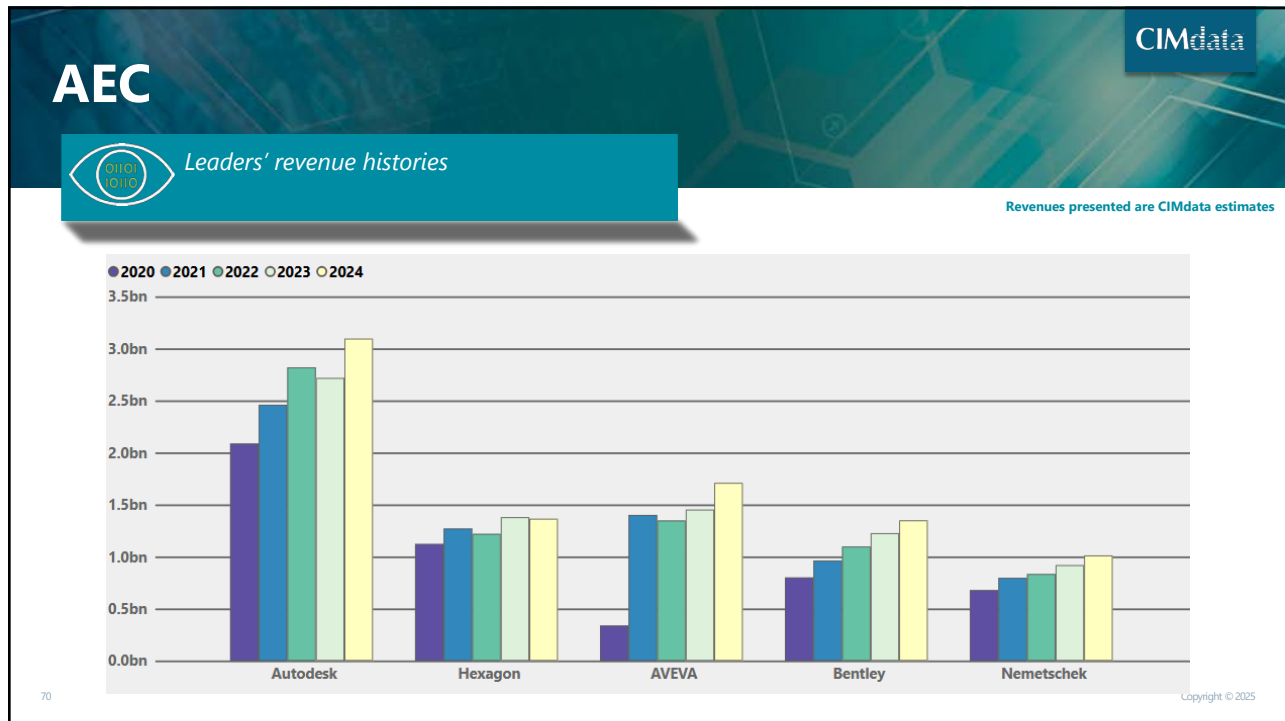
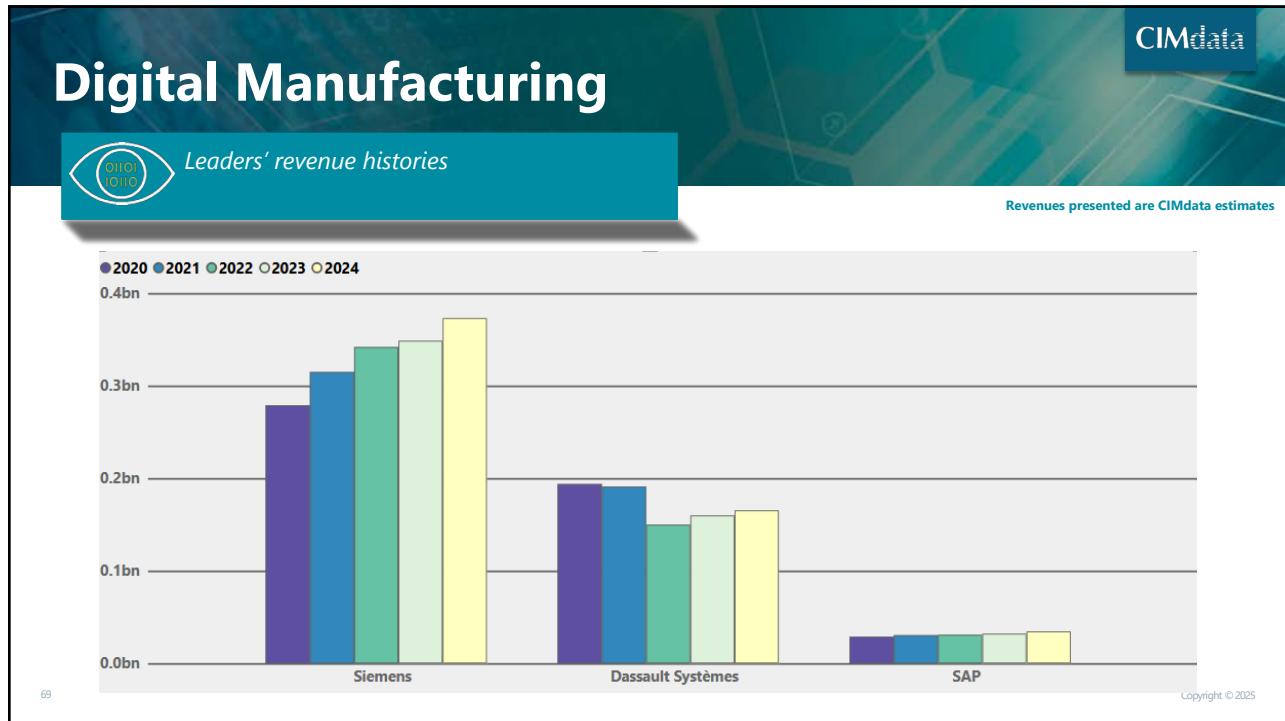
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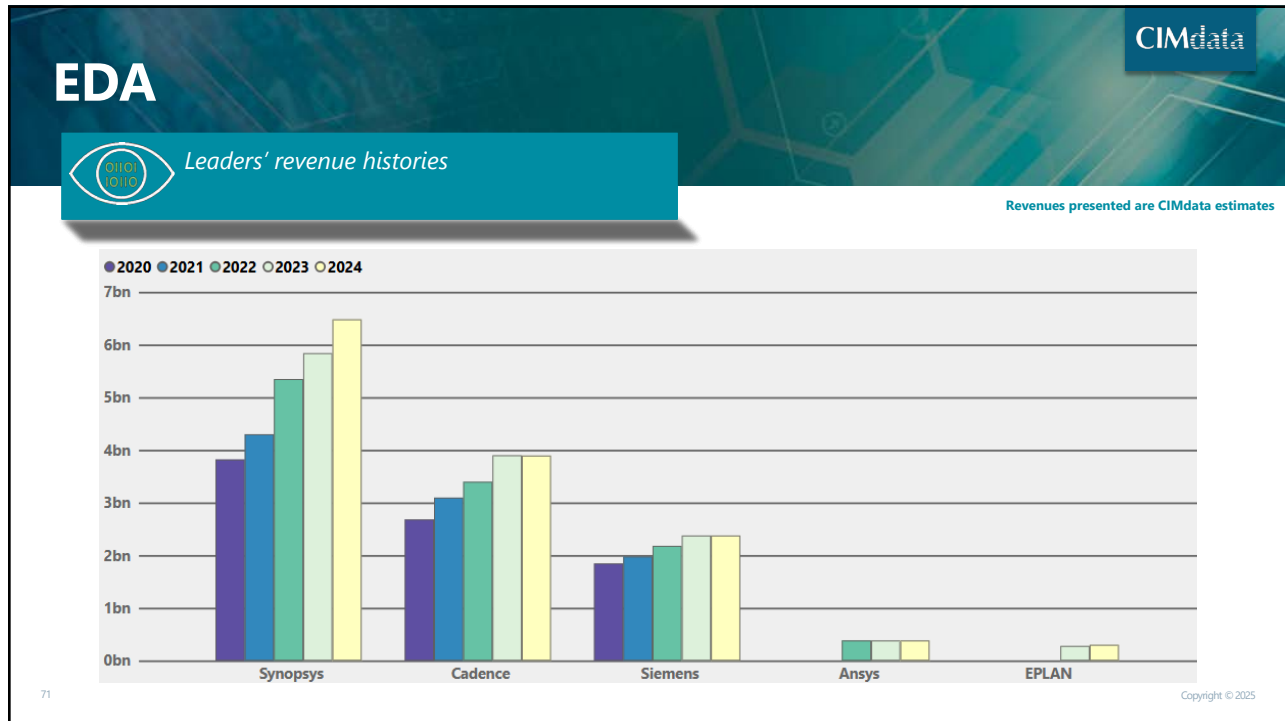
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Agenda CIMdata

- 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

- Exceeded forecast, likely largely in part to maturing transition to subscription
- AI is encouraging users to adopt platforms
- Economic uncertainty is high for the forecast horizon due to American trade policy
- Software resellers are shifting to becoming service providers
- Acquisitions are shifting key players

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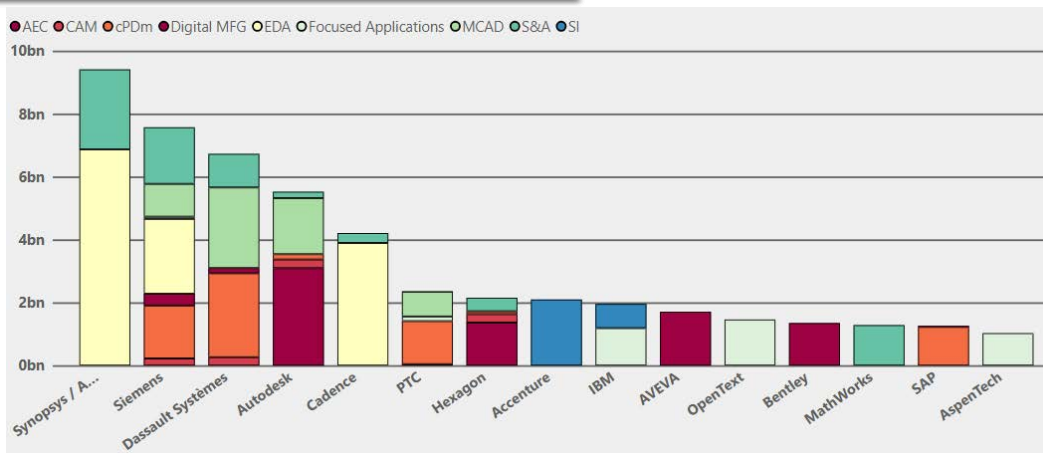
Leaders – The Changing Landscape in 2025

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Changing Landscapes for 2025

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- CIMdata PLM Industry Review and Trends Report
- CIMdata PLM Market and Solution Provider Analysis Report
- CIMdata PLM Market Geographic Analysis Report
- CIMdata PLM Market Industry Analysis Report



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Germany	South Korea
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Italy	United States




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CAM Market Analysis Report

 *33rd annual report in 2024—part of our heritage in CIM*

- Long-running report on Computer-Aided Manufacturing (CAM) market
- Part of our CAM service
- Provides detailed statistics on software spend, seat counts, app areas, etc.
- Delivered in two drops
 - Advance packet: tables and charts contained in the report
 - CAM MAR: full report with market updates, commentary, etc.



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 *Expands CIMdata's market analyses with focused, S&A specific content*

- Expanded coverage of S&A market
- 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
- Also includes relevant end-user research from our collaborative research program



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Questions & Answers

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What's on your mind?



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