

# 2024 PLM Market Results

2025 Market & Industry Forum—27 March 2025

**CIMdata**

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

**27 March 2025—Ann Arbor, Michigan USA**

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**#PLM4um**

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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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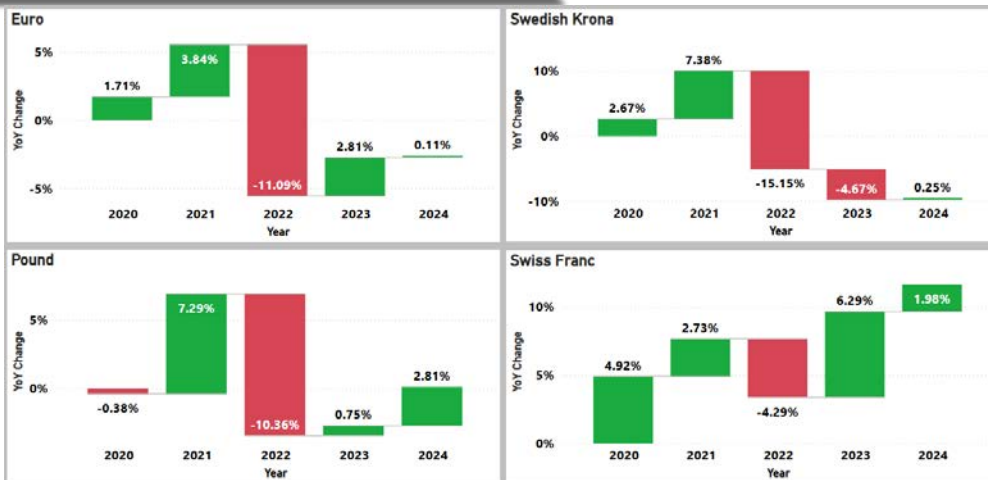
## Currency Fluctuations vs US\$ - EMEA

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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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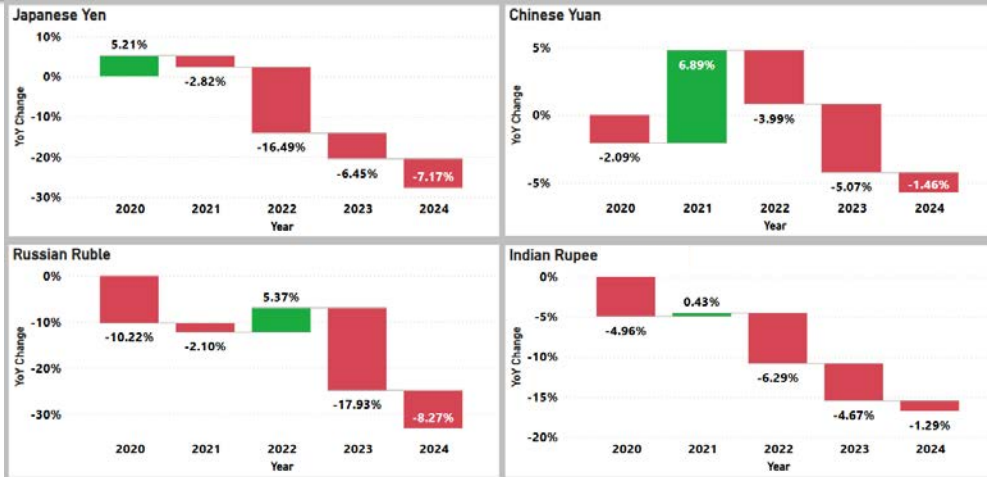
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## Currency Fluctuations vs US\$ – AP



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             |

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## 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

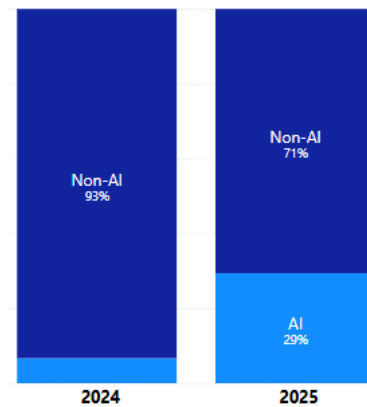
| Other Notable Acquisitions |                   |   |
|----------------------------|-------------------|---|
| Acquirer                   | Company           | Comment   |
| Autodesk                   | Datum360          | Data connection tools for data connectivity                 |
| Bechtel                    | 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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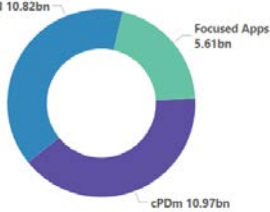
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## PLM Market Categories – Change for 2024

 Moving ALM, IoT, & Requirements Management to Focused Applications

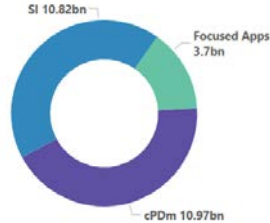
- Technologies increasingly meet the definition of cPDm
  - ALM (for embedded software)
  - IoT for enabling Digital Twin
  - Requirements Management
- Updated calculations enable visualization either way
- Expanded Focused Applications to be looked at for sub segmentation

**Updated cPDm**



| Category     | Value   |
|--------------|---------|
| SI           | 10.82bn |
| Focused Apps | 5.61bn  |
| cPDm         | 10.97bn |

**Traditional cPDm**



| Category     | Value   |
|--------------|---------|
| SI           | 10.82bn |
| Focused Apps | 3.7bn   |
| cPDm         | 10.97bn |

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## Overall PLM Results



Growth in 2024 above forecast

- Overall PLM growth (9.7%) 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   |
|------------------------------|-----------------|--------------|
| <b>cPDM</b>                  | <b>\$25,485</b> | <b>9.0%</b>  |
| cPDM Comprehensive           | \$10,966        | 8.4%         |
| Focused Applications         | \$3,700         | 12.0%        |
| SI/Reseller/VAR              | \$10,819        | 8.5%         |
| <b>Tools</b>                 | <b>\$52,940</b> | <b>10.0%</b> |
| 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%        |
| <b>Digital Manufacturing</b> | <b>\$1,043</b>  | <b>8.5%</b>  |
| <b>Total</b>                 | <b>\$79,468</b> | <b>9.6%</b>  |

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   |
|------------------------------|-----------------|--------------|
| <b>cPDM</b>                  | <b>\$27,400</b> | <b>8.8%</b>  |
| 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%         |
| <b>Tools</b>                 | <b>\$51,026</b> | <b>10.1%</b> |
| 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%        |
| <b>Digital Manufacturing</b> | <b>\$1,043</b>  | <b>8.5%</b>  |
| <b>Total</b>                 | <b>\$79,468</b> | <b>9.6%</b>  |


Updated  
cPDM

Revenue in Millions

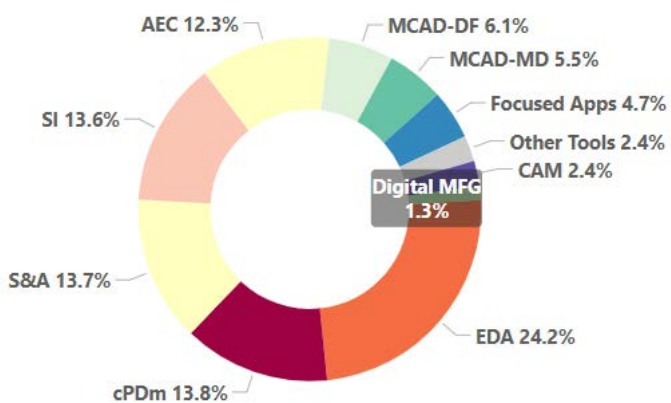
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## PLM Investments by Segment


Market grew by 9.7% to US\$79.5B in 2024

Revenues presented are CIMdata estimates



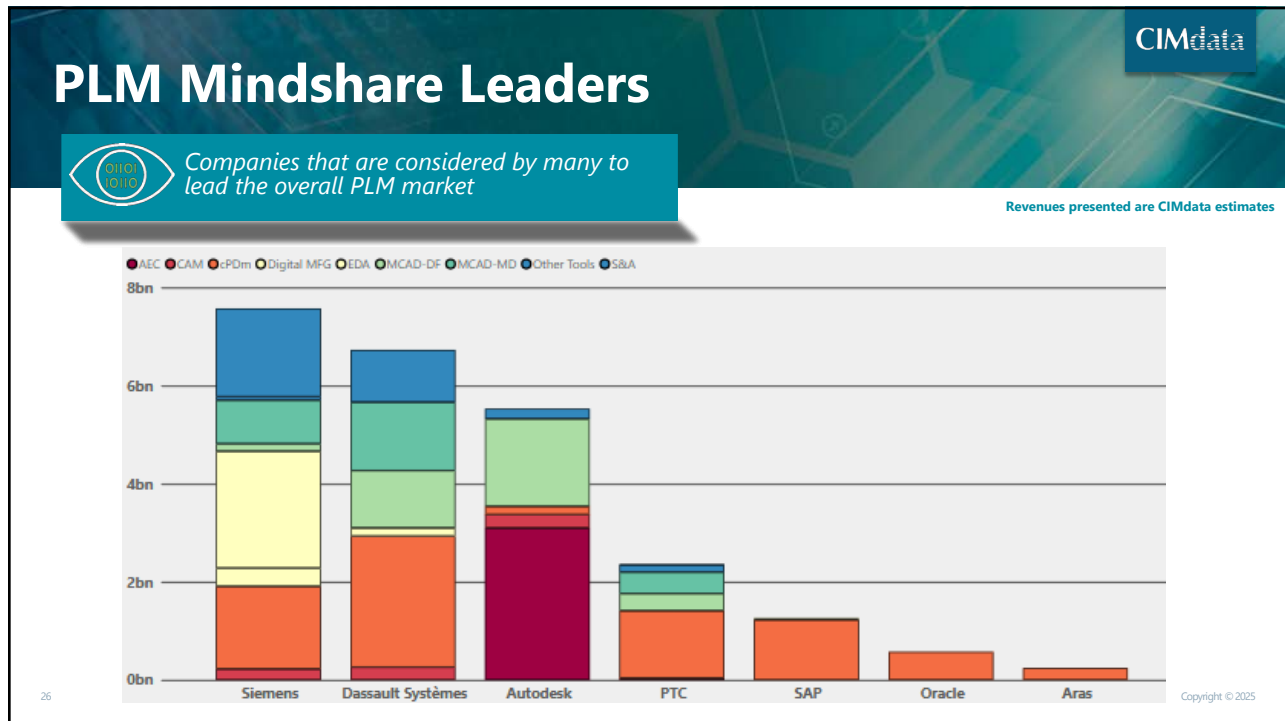
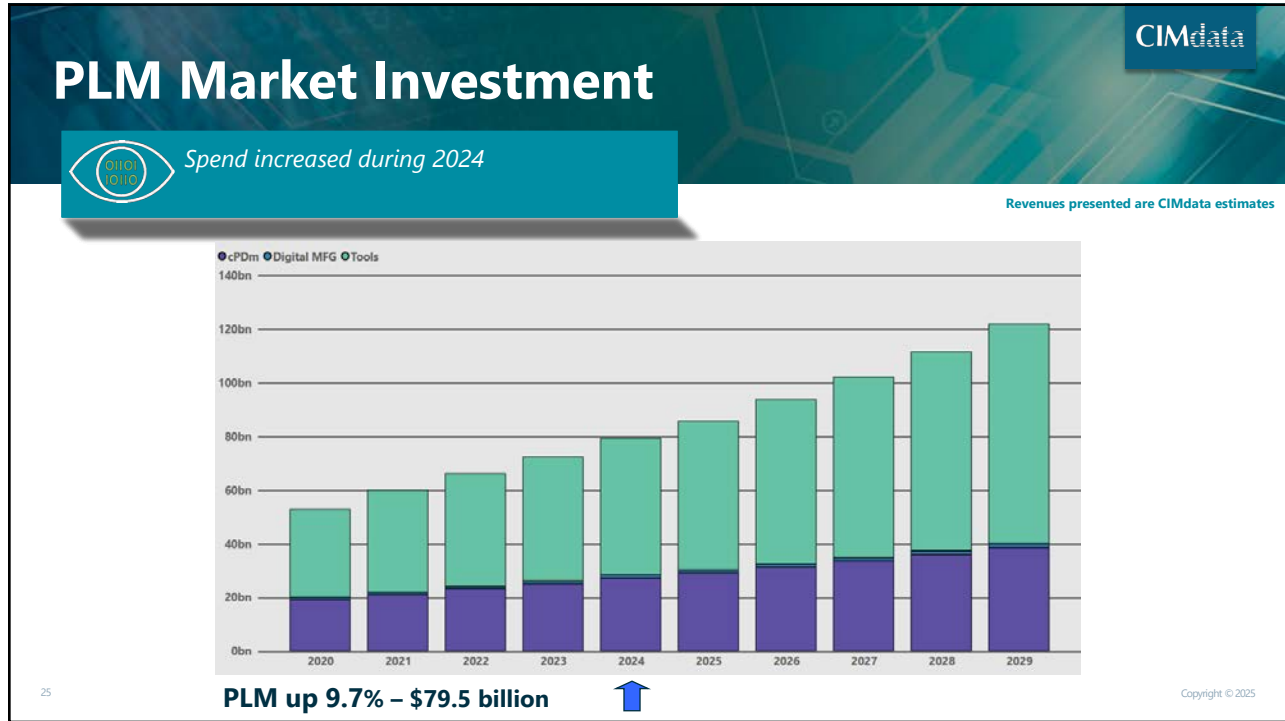
|              |                       |
|--------------|-----------------------|
| AEC          | 9,783,637,549         |
| CAM          | 1,900,839,532         |
| cPDM         | 10,965,909,912        |
| Digital MFG  | 1,042,692,073         |
| EDA          | 19,246,137,054        |
| Focused Apps | 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        |
| <b>Total</b> | <b>79,468,381,177</b> |

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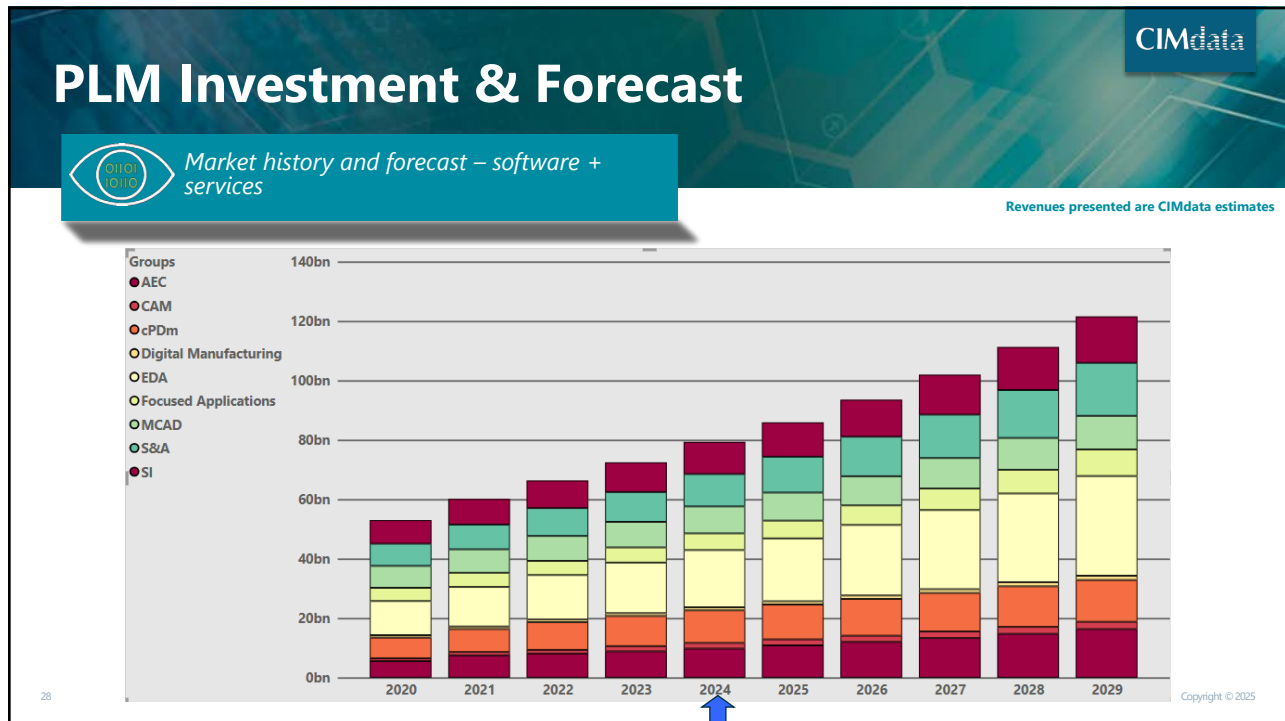
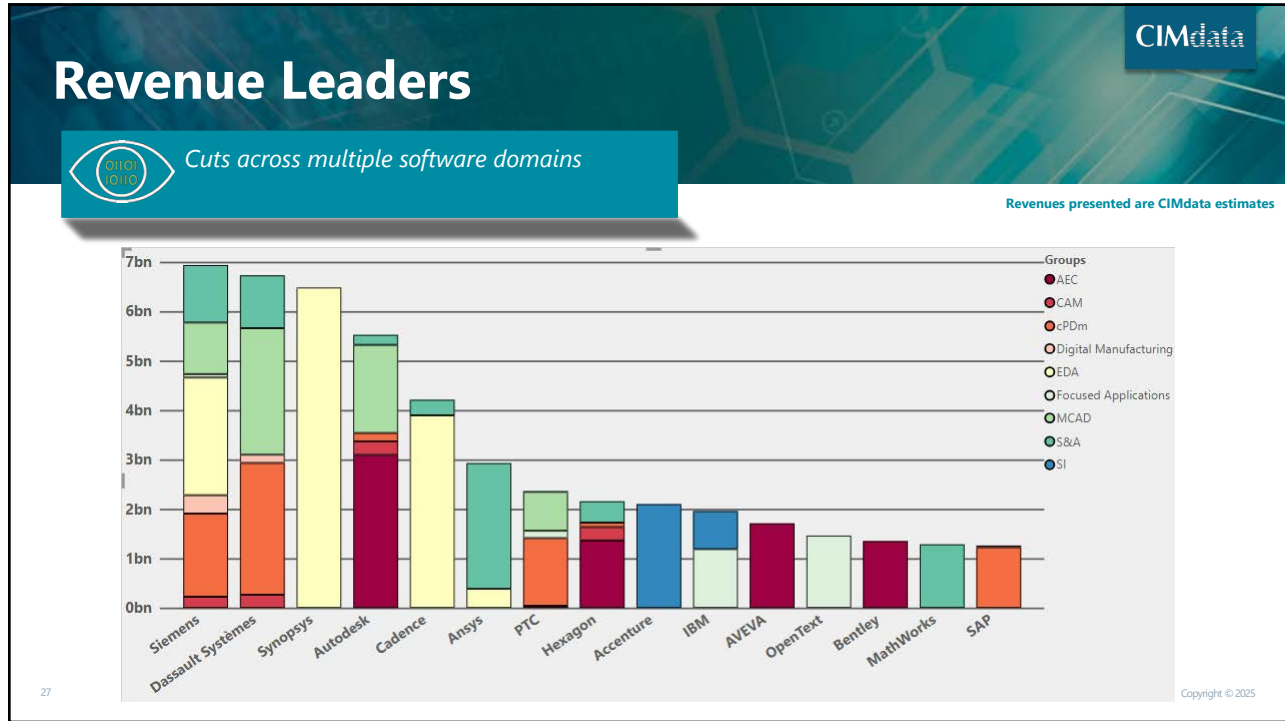
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## PLM Market in 2024



*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  |
|------------------------------|-----------------|-------------|--------------|
| <b>cPDm</b>                  | <b>\$29,269</b> | <b>6.8%</b> | <b>7.1%</b>  |
| 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%         |
| <b>Tools</b>                 | <b>\$55,827</b> | <b>9.4%</b> | <b>10.1%</b> |
| 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%        |
| <b>Digital Manufacturing</b> | <b>\$1,091</b>  | <b>4.7%</b> | <b>6.8%</b>  |
| <b>Total</b>                 | <b>\$86,188</b> | <b>8.5%</b> | <b>9.0%</b>  |

Revenue in Millions

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## Agenda

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

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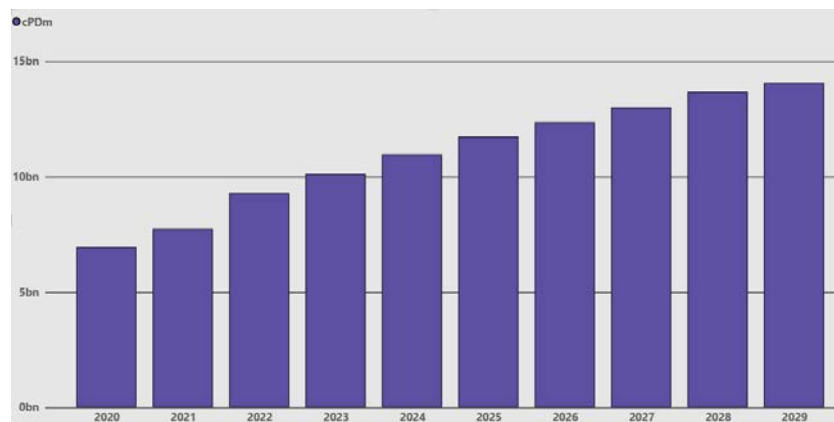
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## 2024 cPDM Revenue



Five-year CAGR estimate = 5.1%

Revenues presented are CIMdata estimates

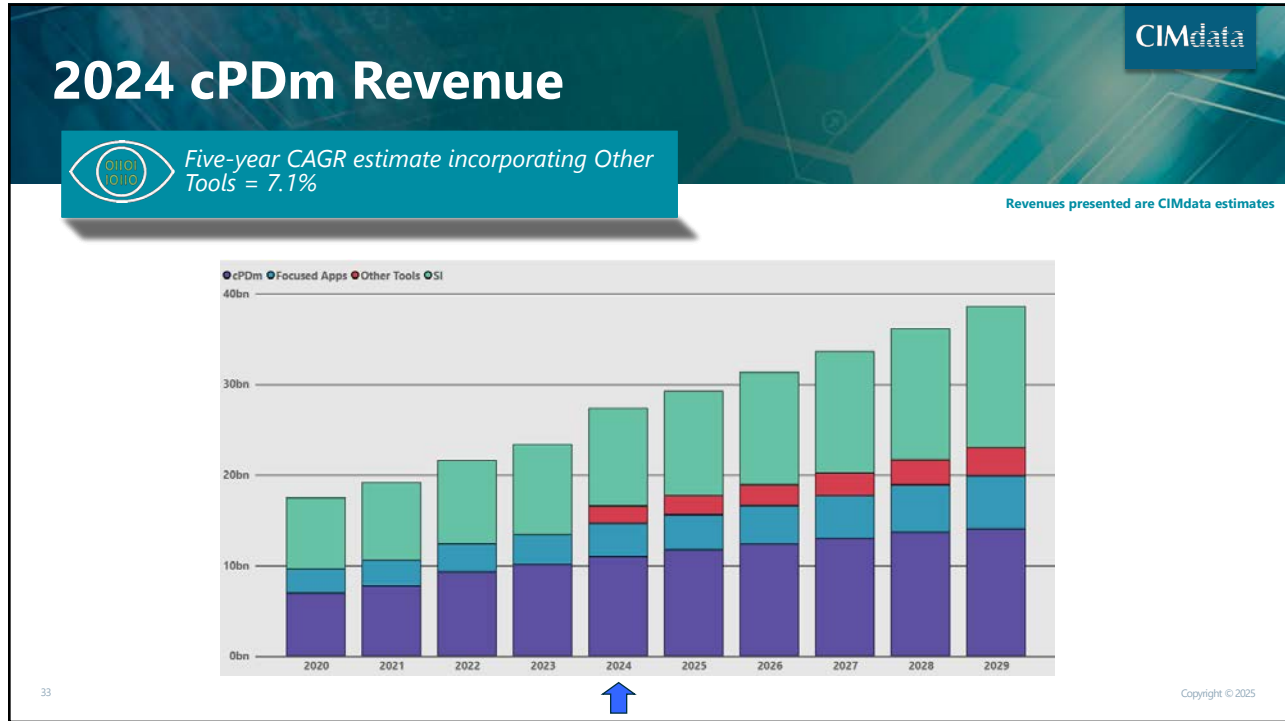


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## Revenue Ratios – Software vs. Services

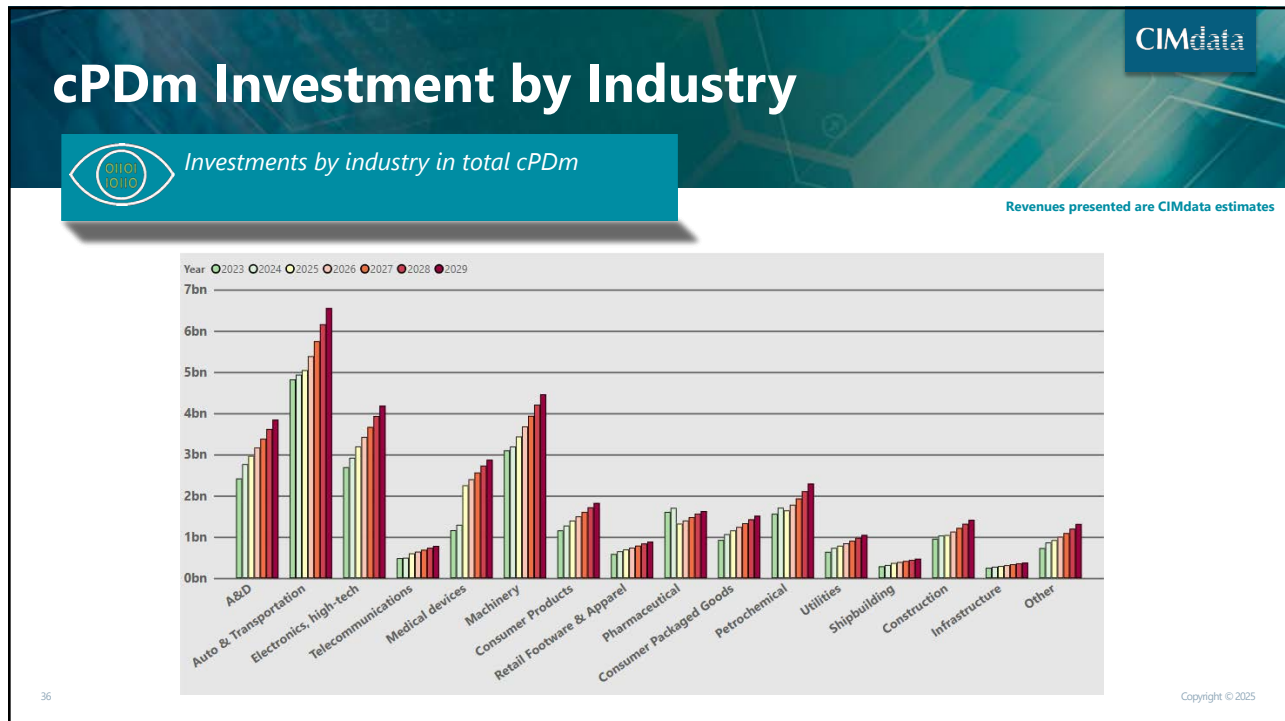
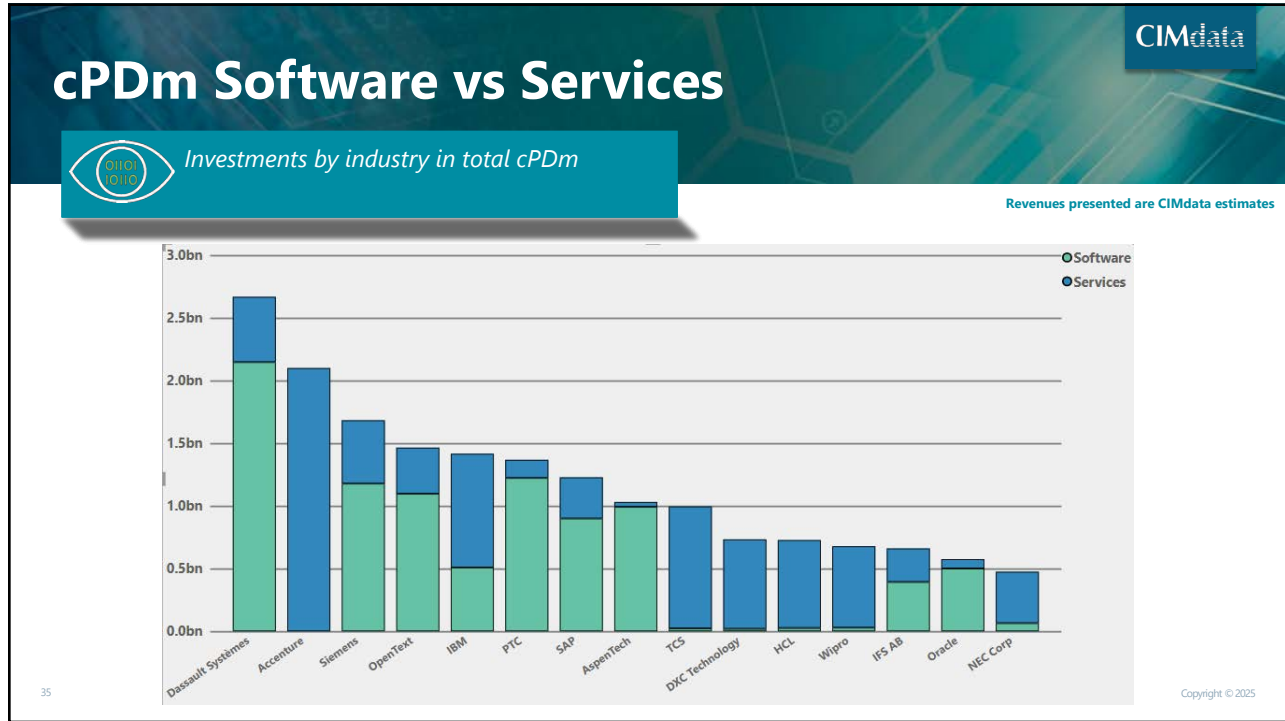
Services is a major revenue area

- 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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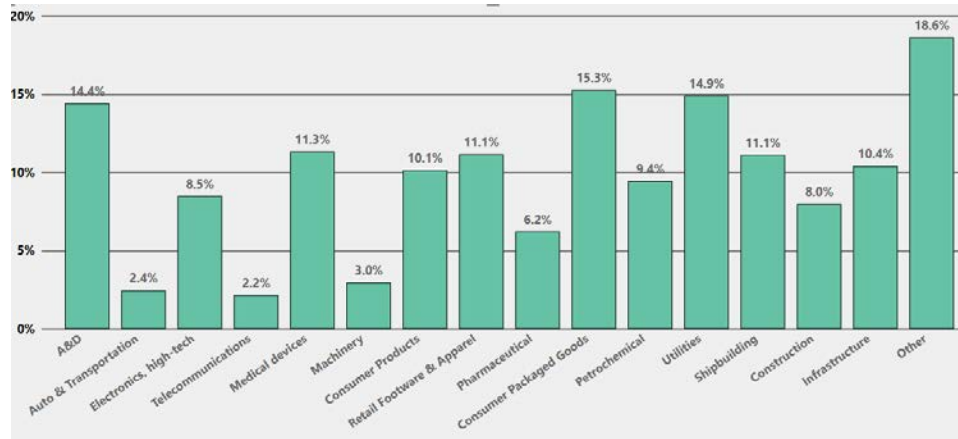
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## cPDM YoY Change



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



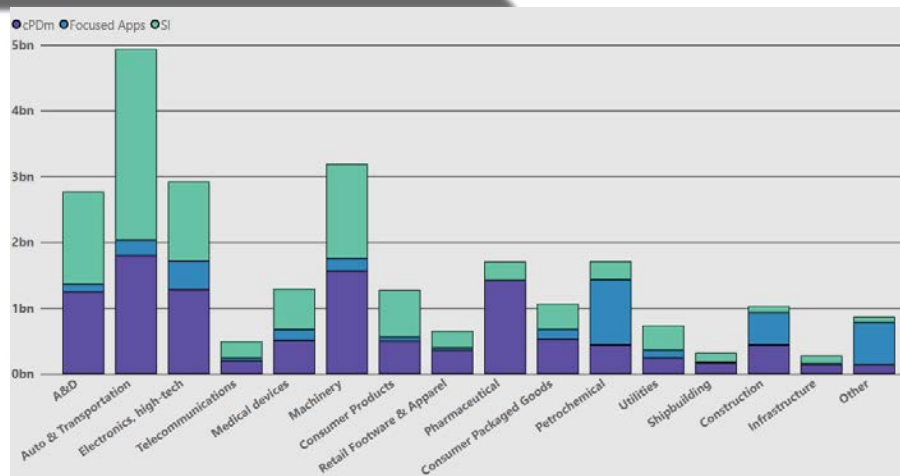
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## Industry Breakdown of cPDM



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

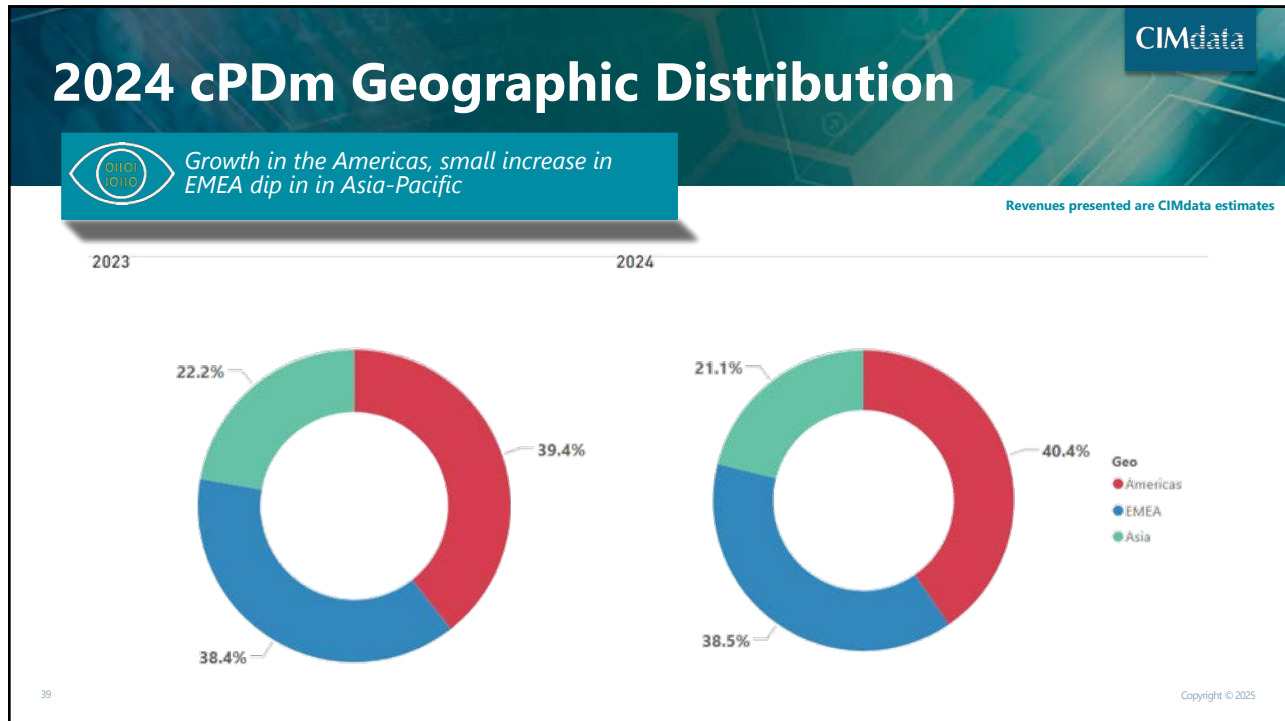


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- Provider Sector Analysis
- Concluding Remarks

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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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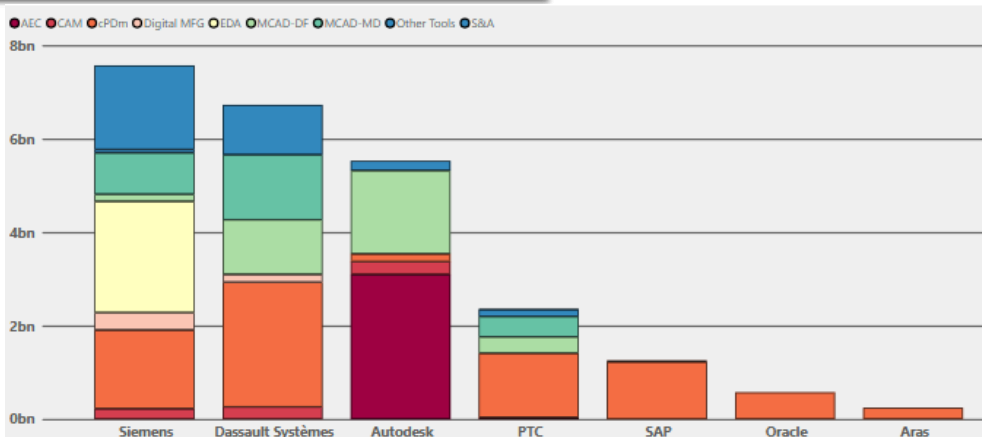
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## 2024 PLM Mindshare Leaders Revenue



Leaders' direct revenues—led by providers of CAD tools

Revenues presented are CIMdata estimates

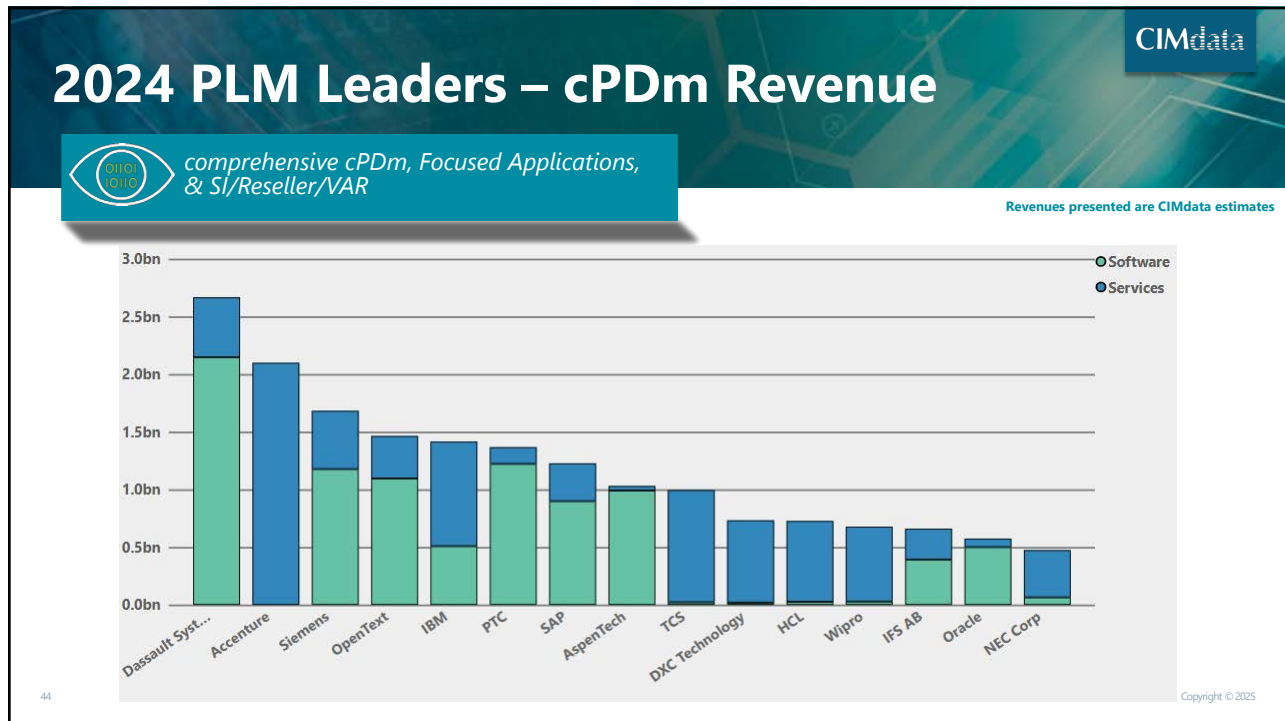
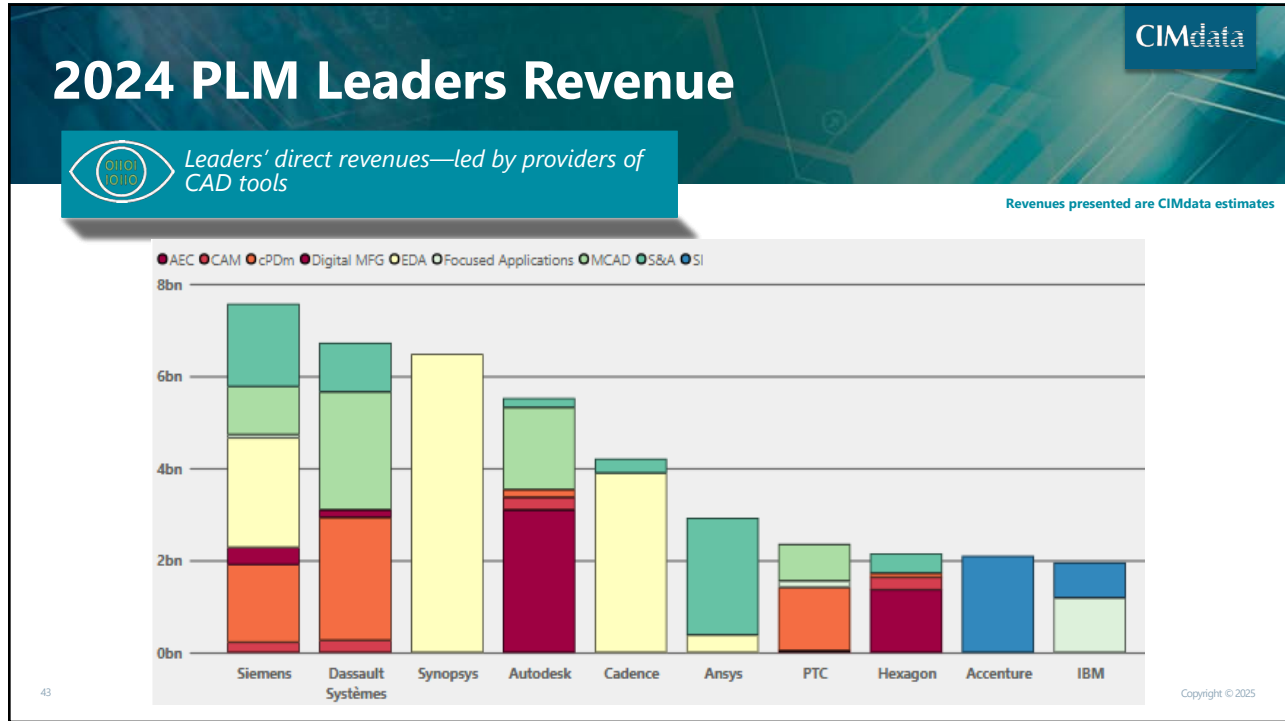


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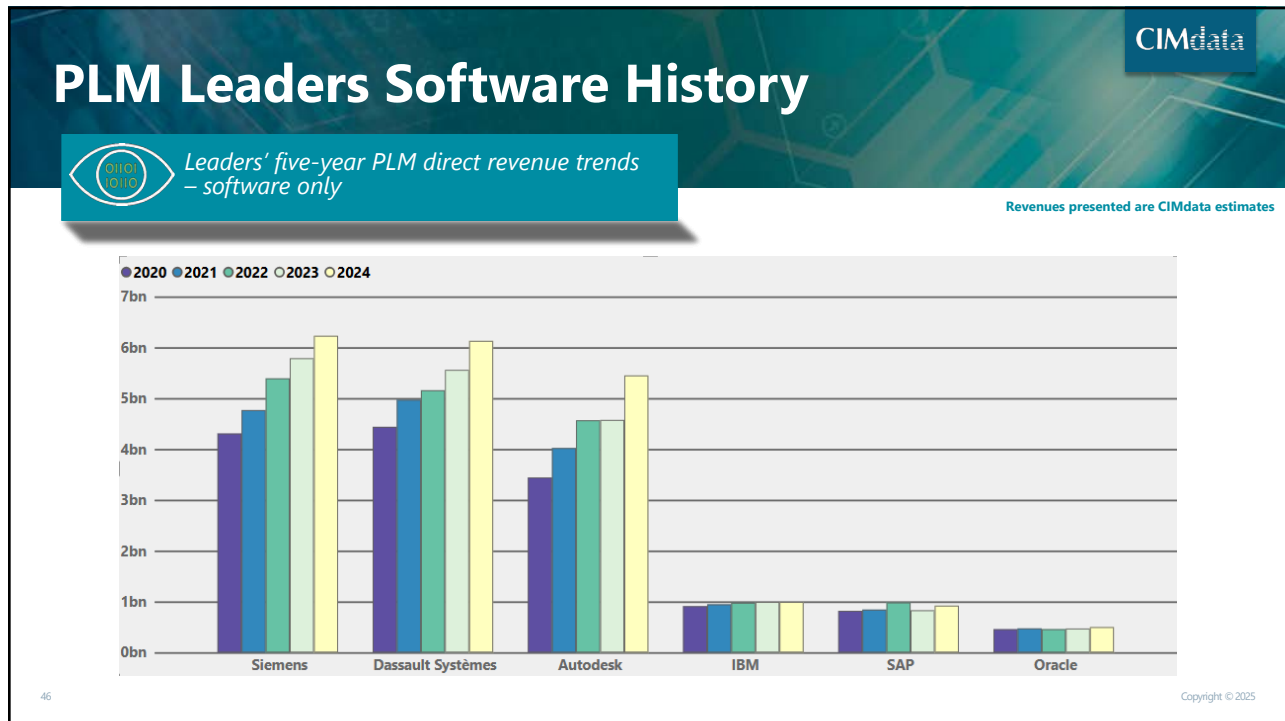
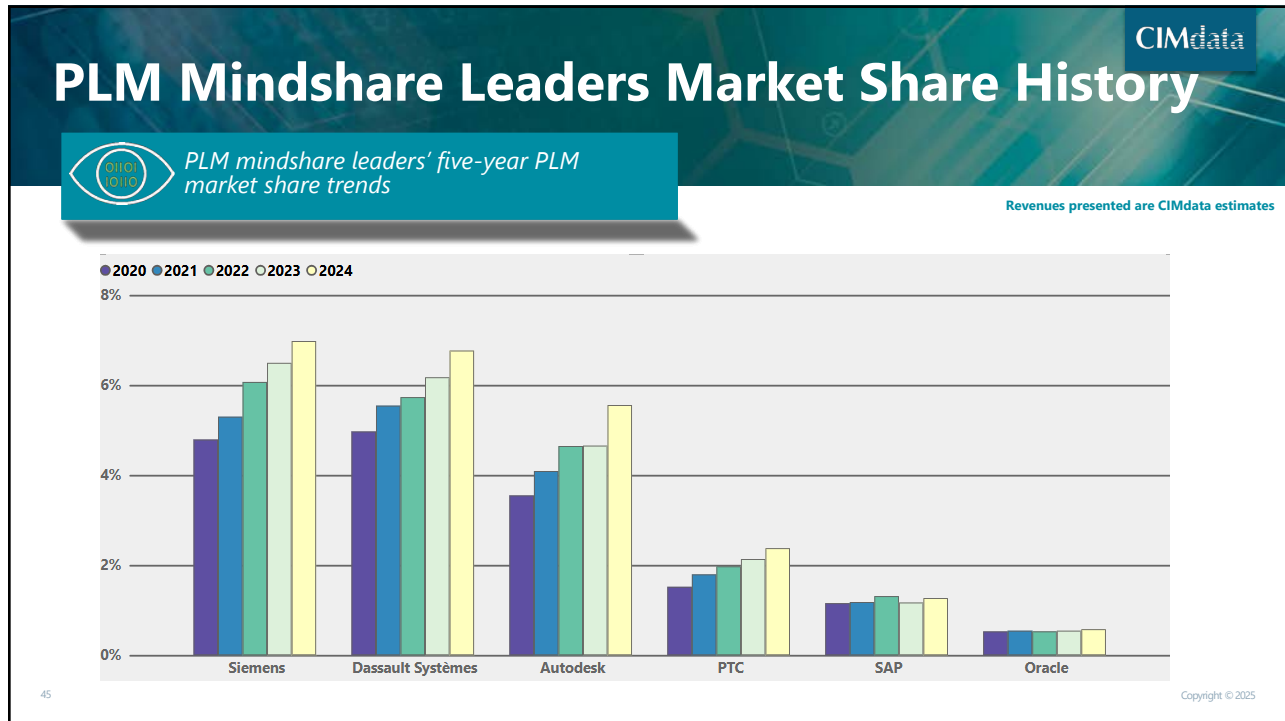
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## Overall PLM Market Revenue Leaders



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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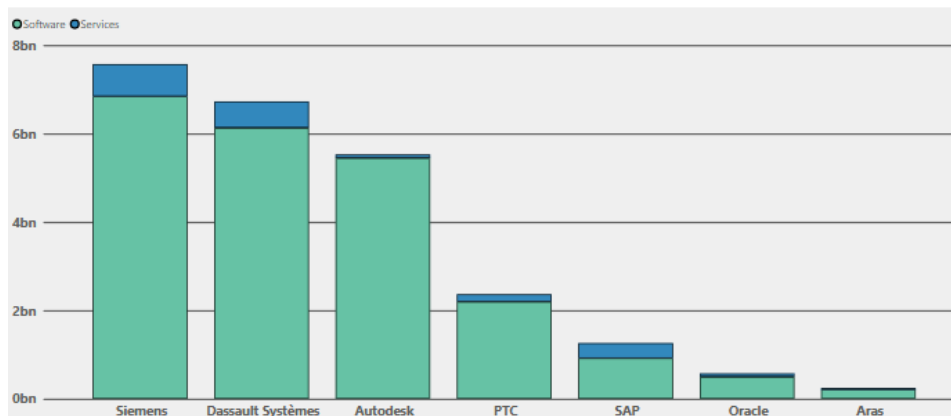
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## 2024 PLM Mindshare Leaders – Revenue



Overall Software & Services for Mindshare Leaders

Revenues presented are CIMdata estimates

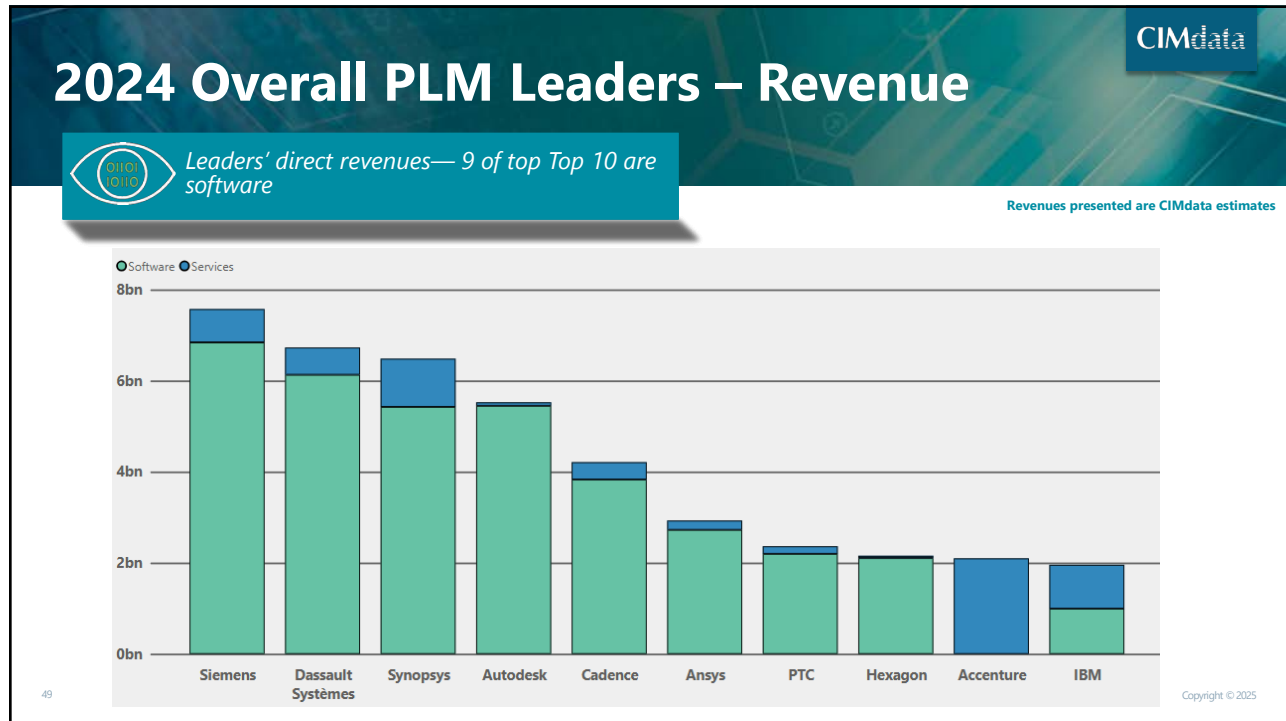


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## Scope of Services Continues to Evolve

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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# 2024 PLM Market Results

2025 Market & Industry Forum—27 March 2025



- CIMdata
- ## Agenda
- PLM Market Analysis
  - Overall cPDM Market Analysis
  - PLM Provider Analysis
  - Provider Segment Analysis
  - Concluding Remarks
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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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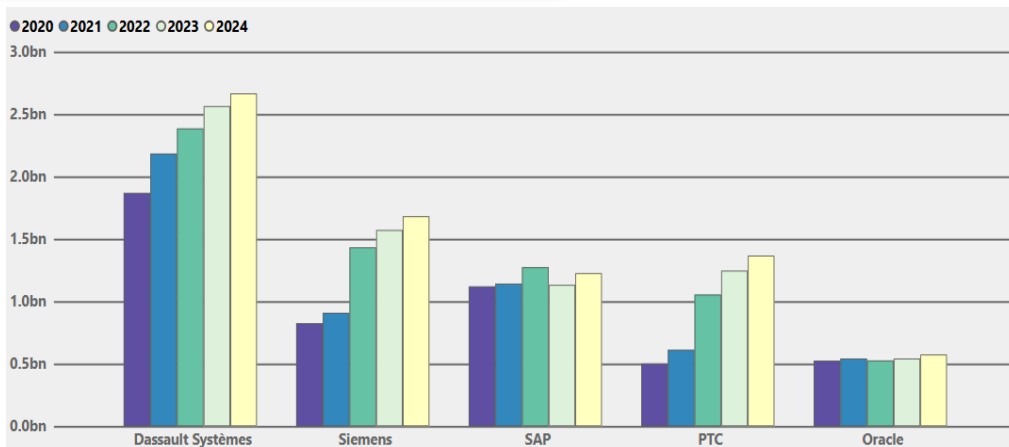
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## Comprehensive cPDM Leaders Revenue



Leaders' five-year cPDM direct revenue trends

Revenues presented are CIMdata estimates

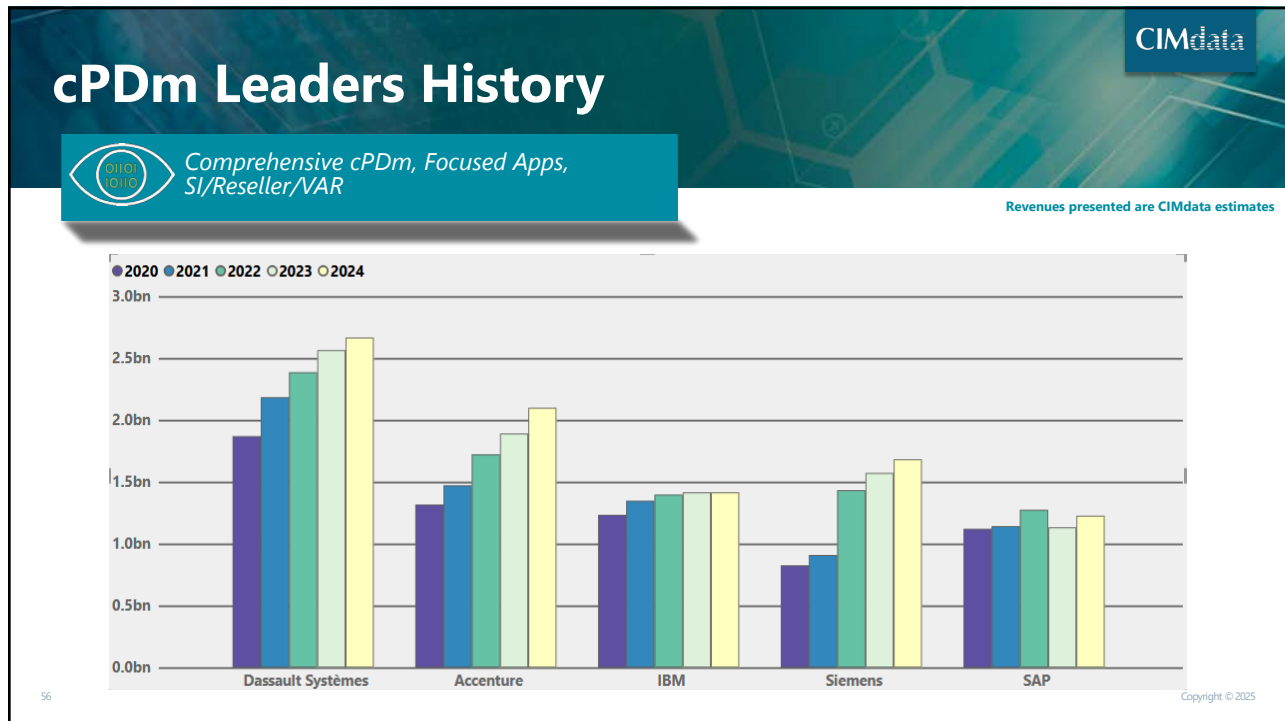
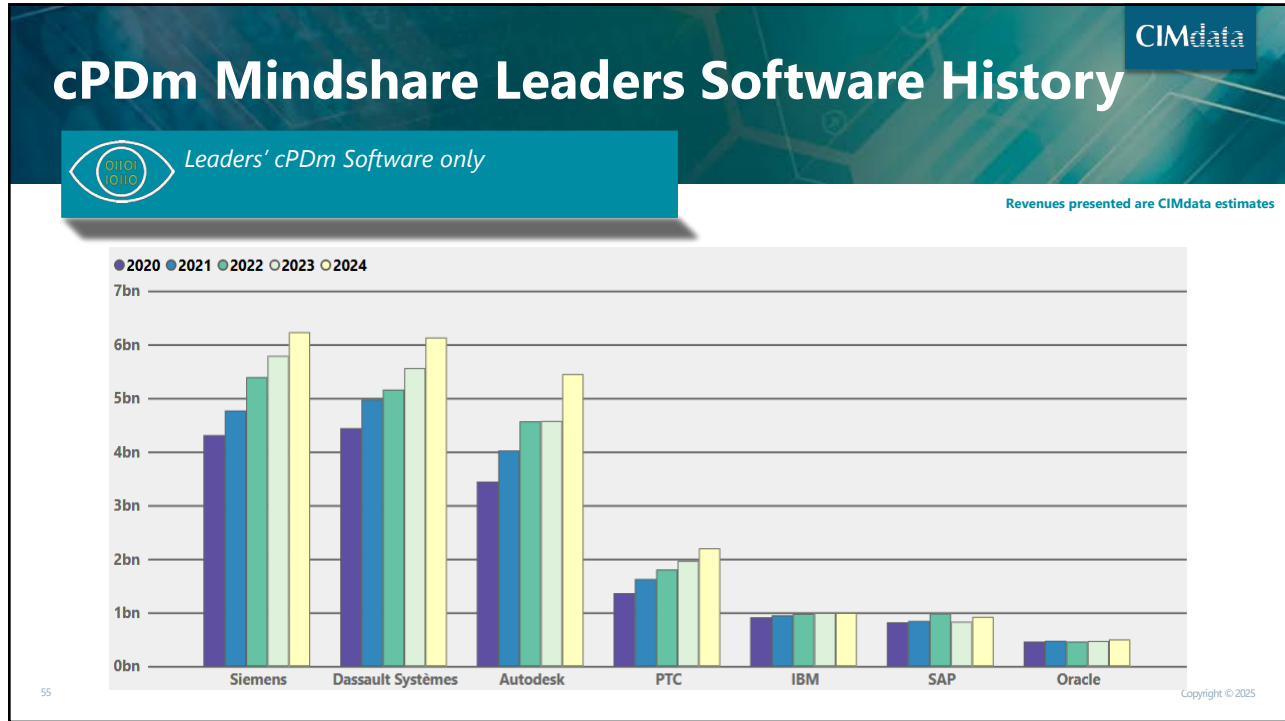


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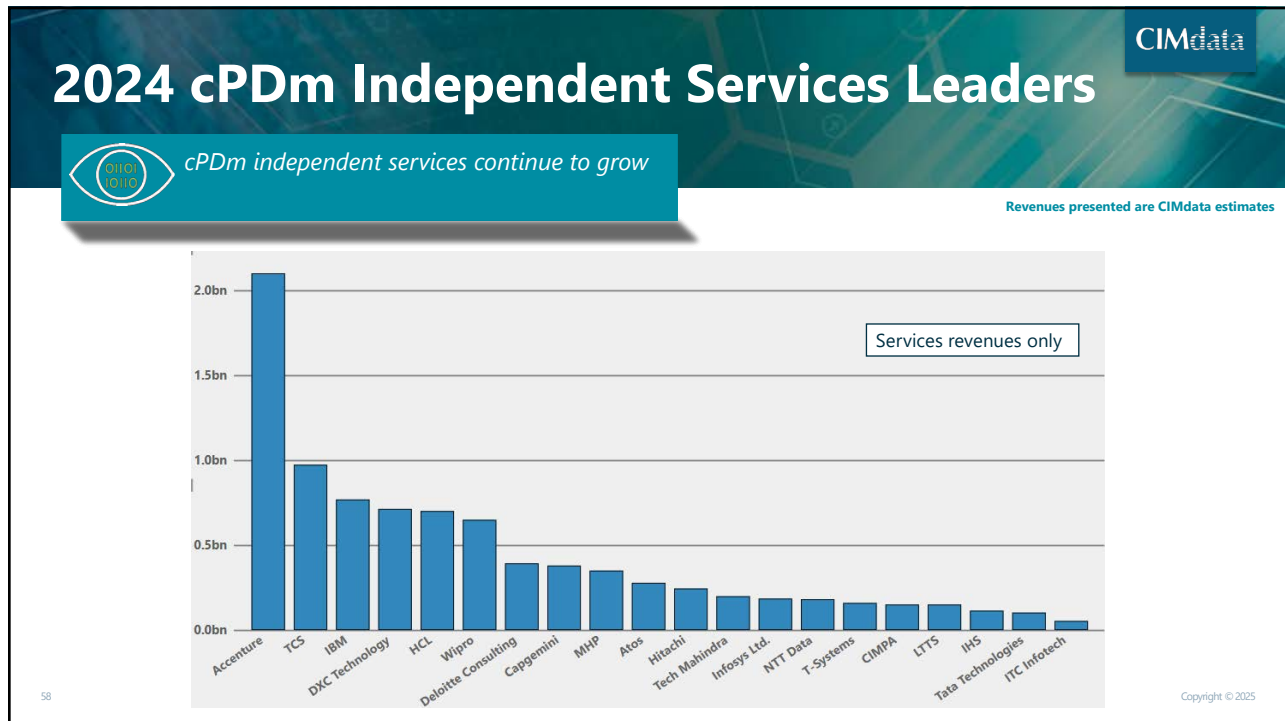
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## Overall cPDM Providers



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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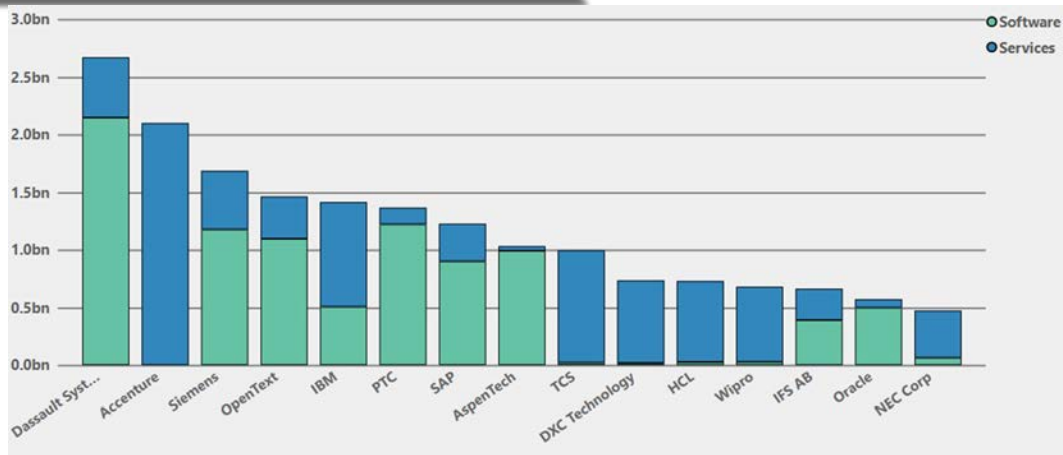
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## Overall, 2024 cPDM Revenue Leaders



Services are a major factor in overall revenue

Revenues presented are CIMdata estimates



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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

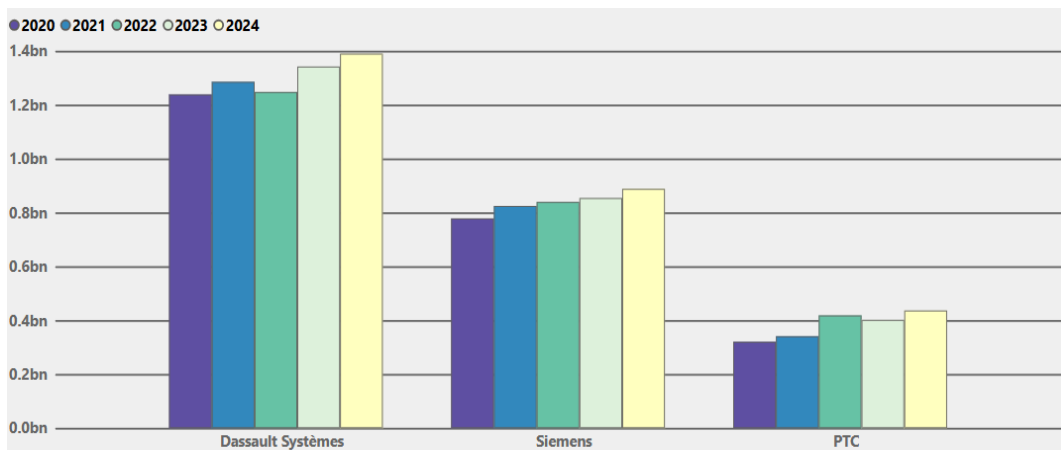
| Segment              | Comments  |
|----------------------|---|
| MCAD-MD              | Multi Disciplinary is increasingly cannibalized by design focused but still strong in certain industries                          |
| MCAD-DF              | The transition to subscription is increasing growth rapidly   |
| 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



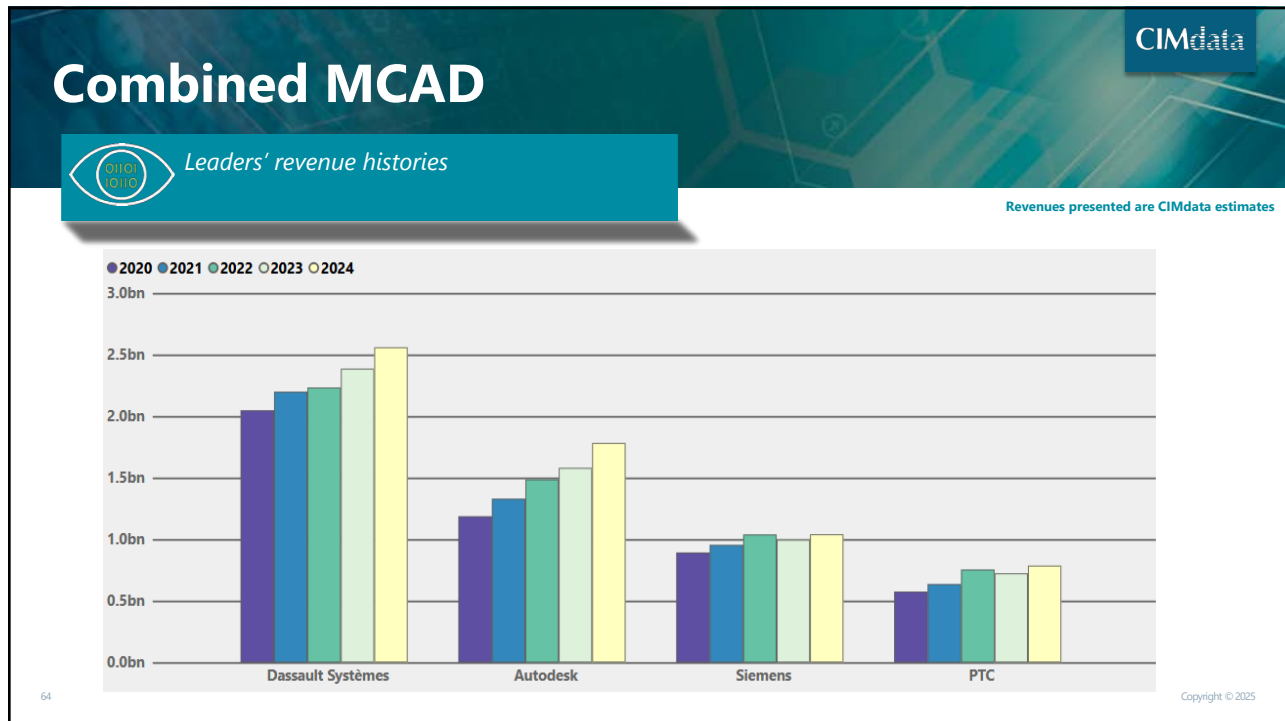
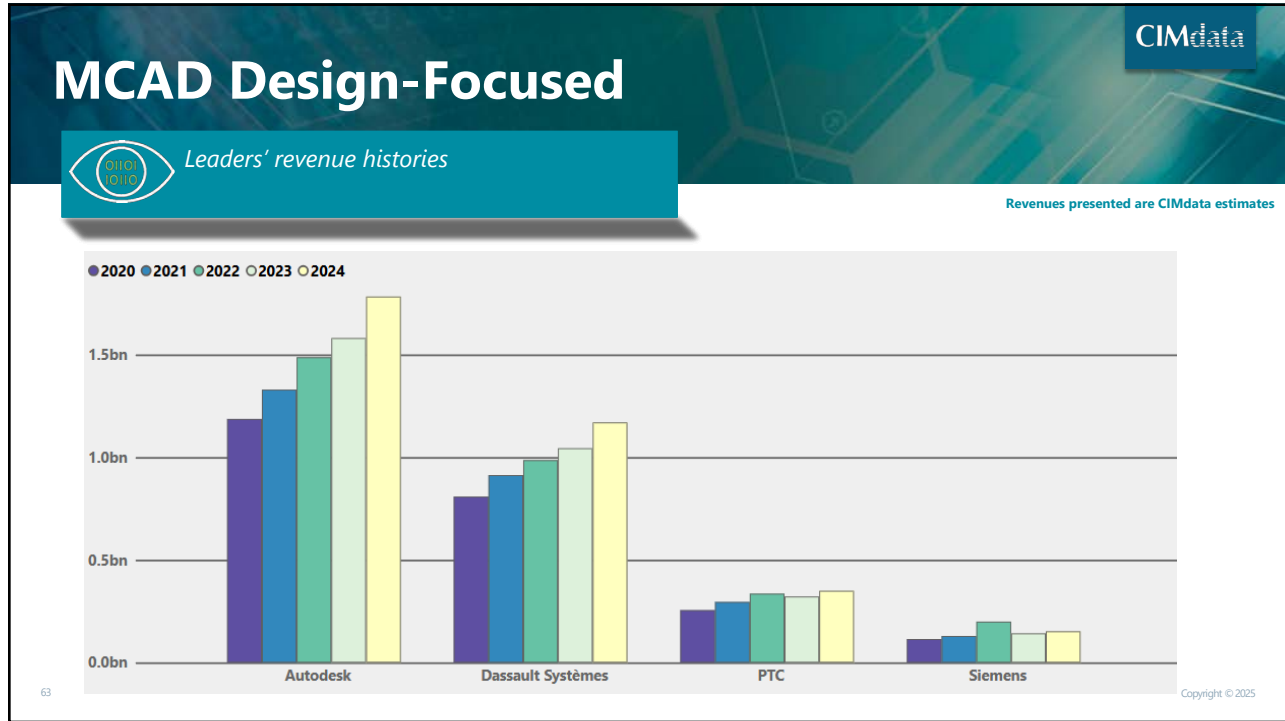
Leaders' revenue histories

Revenues presented are CIMdata estimates



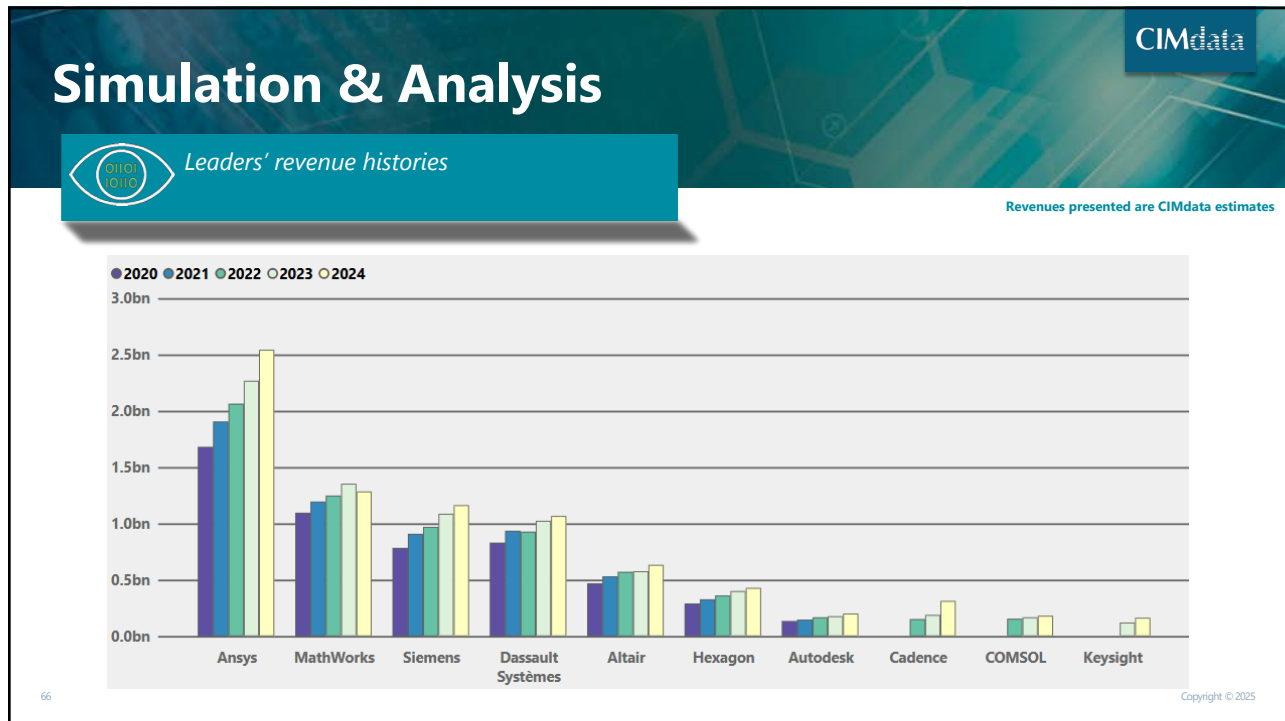
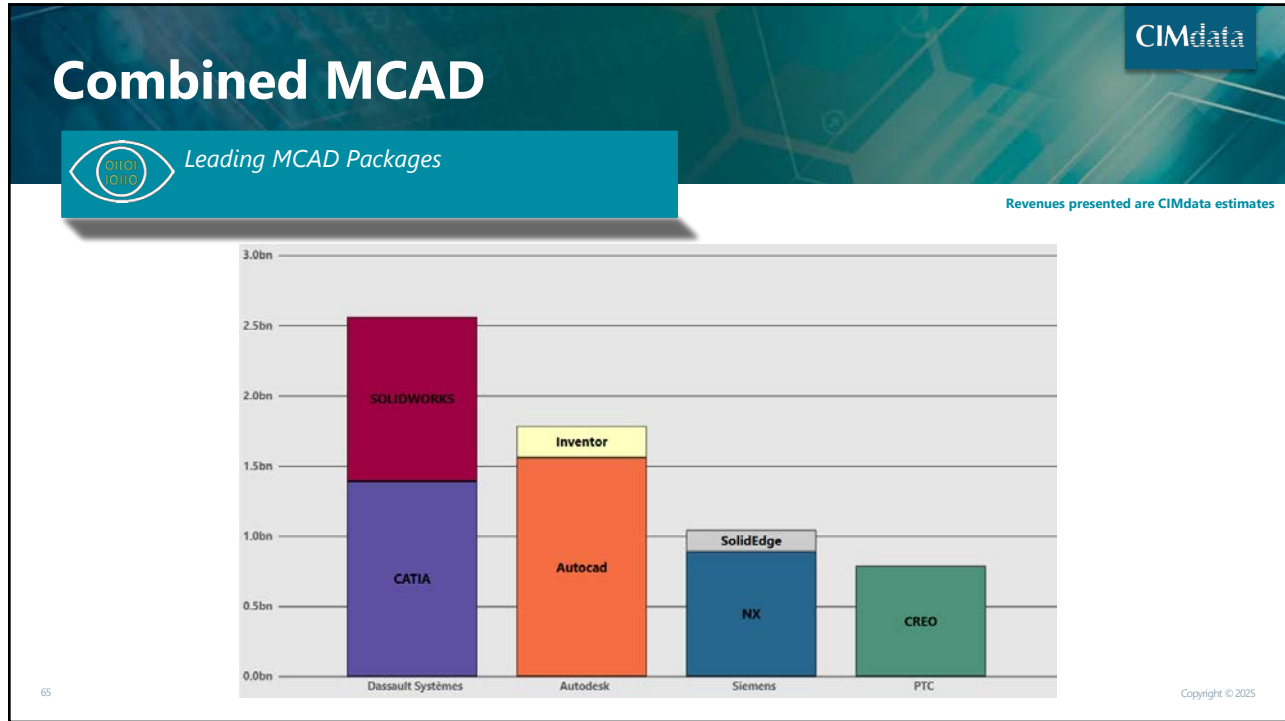
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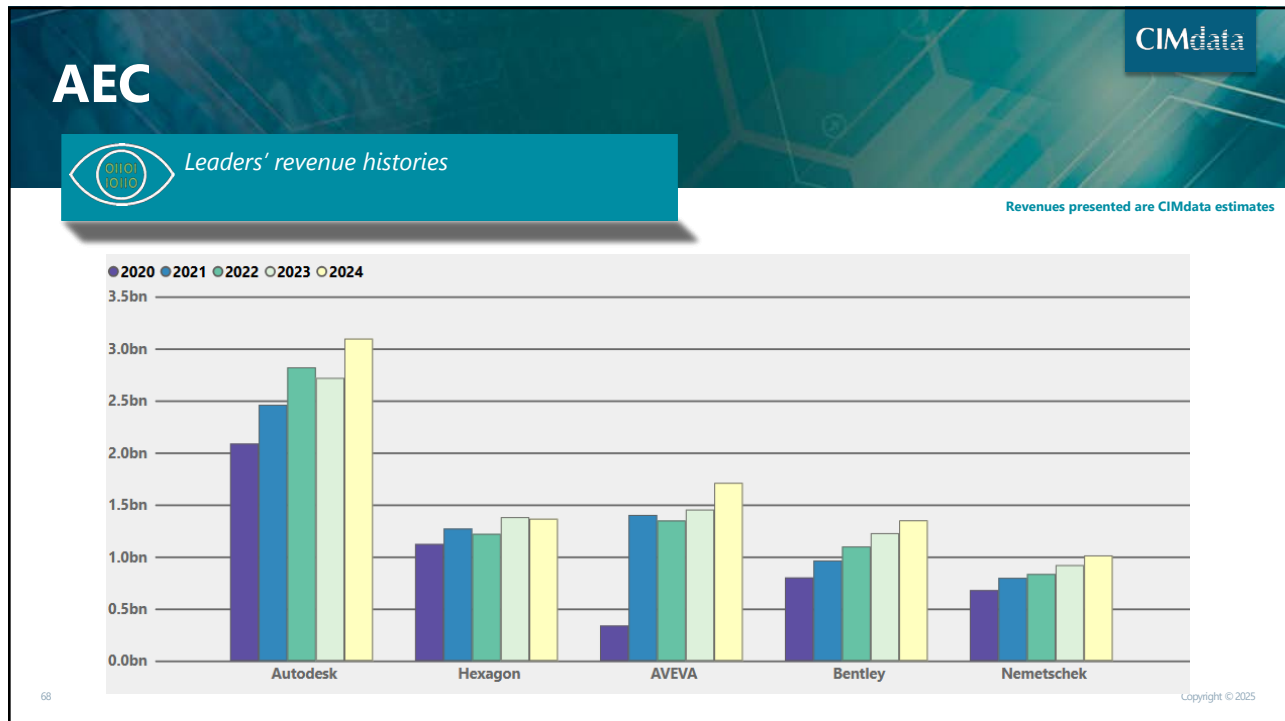
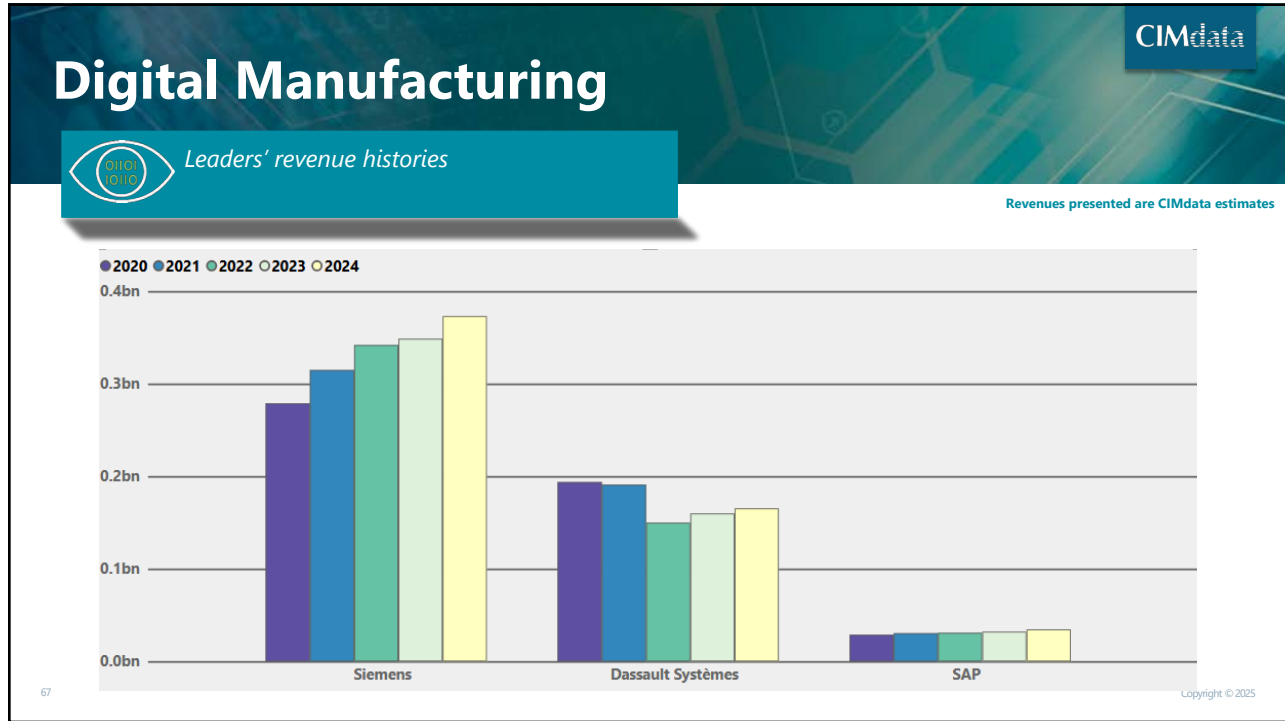
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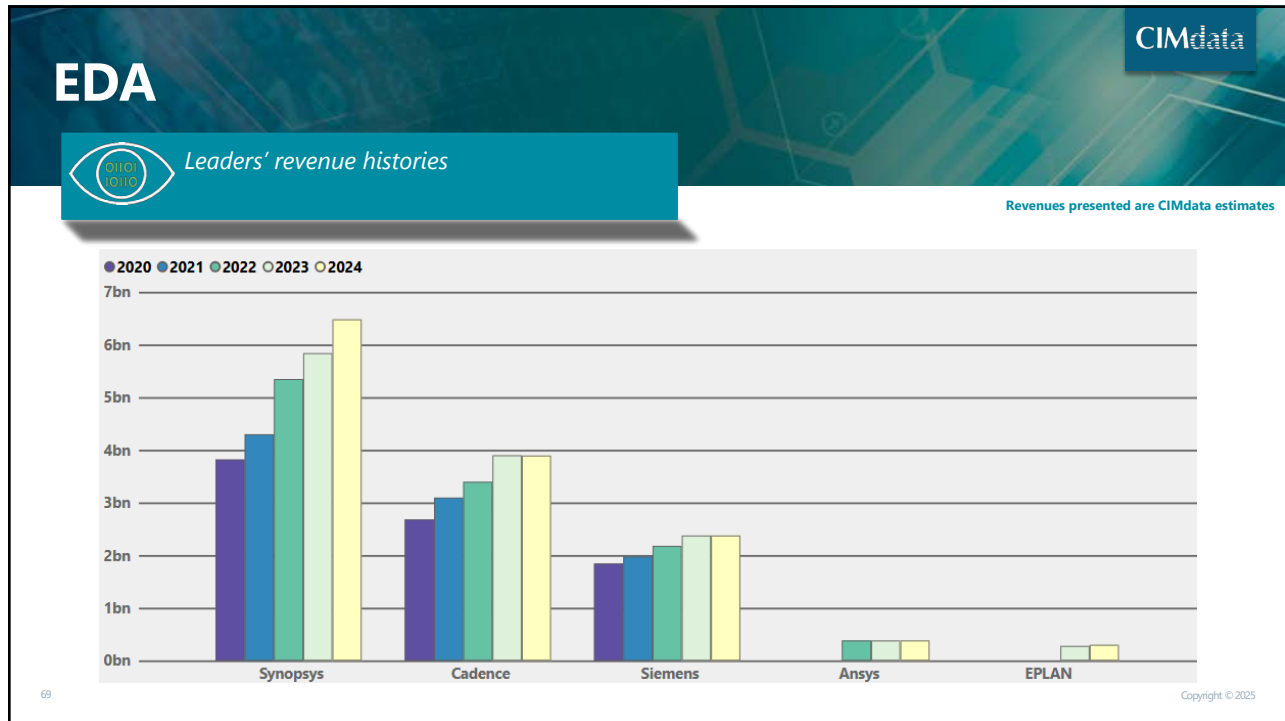
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**Agenda** CIMdata

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## Concluding Remarks



Factors impacting the PLM Economy

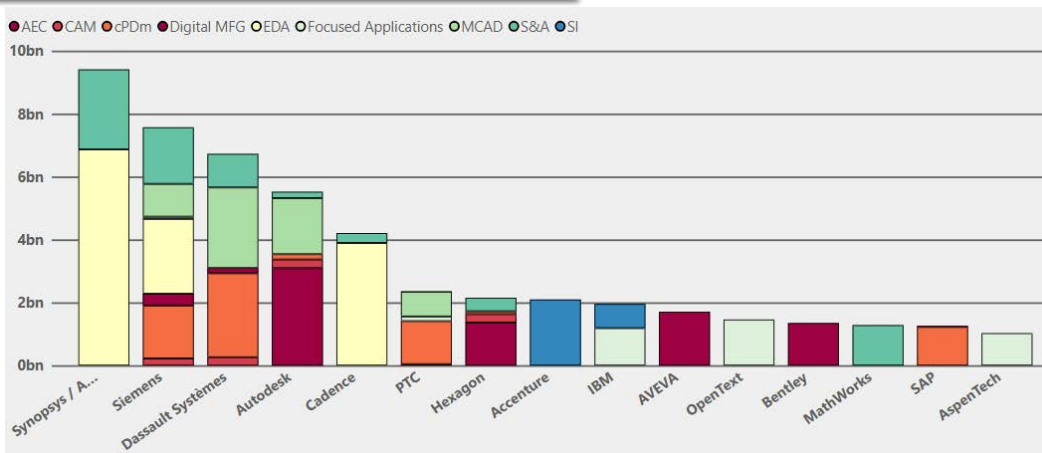
- Exceeded forecast, likely largely in part to maturing transition to subscription
- AI is encouraging users to adopt platforms
- Economic uncertainty is high for the forecast horizon due to American trade policy
- Software resellers are shifting to becoming service providers
- Acquisitions are shifting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

## Leaders – The Changing Landscape in 2025



Changing Landscapes for 2025

Revenues presented are CIMdata estimates




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## CIMdata PLM Market Analysis Report Series

 Major deliverables include a growing series of Market Analysis Reports (1 of 2)

- CIMdata Executive PLM Market Report
- 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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## CIMdata PLM Market Analysis Report Series

 Major deliverables include a growing series of Market Analysis Reports (2 of 2)

- CIMdata China PLM MAR
- Country-specific reports for the following markets:


|         |                |
|---------|----------------|
| Brazil  | Japan          |
| France  | Russia         |
| Germany | South Korea    |
| India   | United Kingdom |
| 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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## Simulation & Analysis Market Analysis Report

 *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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