

# 2025 Market Analysis Results

2026 Market & Industry Forum—9 April 2026

**CIMdata**

**2025 PLM Market Results**  
**PLM Market & Industry Forum**  
**A CIMdata PLM Leadership Event**

**9 April 2026—Paris, FRANCE**

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**#PLM4um**

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**CIMdata** Defining What Comes Next in Digital Transformation

**Cross-Industry Digital Impact**

**CIMdata: The Leading Authority on PLM**  
 An independent global leader providing research, education, and strategic consulting for digital transformation.

**Maximizing Product Innovation**  
 Focused on helping clients design, acquire, deliver, and support innovative products and services.

**Competitive Global Advantage**  
 Utilizing strategic management consulting to drive success in complex global markets.

**Defining "What Comes Next"**  
 Guiding organizations through the evolving landscape of digital transformation and industrial innovation.

**Leading strategic management consulting firm**

**Industry Verticals & Core Focus Areas**

Industry Vertical	Core Focus Area
Transport & Tech	Aerospace, Automotive, and Computing
Infrastructure	Construction, Manufacturing, and Logistics
Service & Care	Healthcare, Retail, and Global Communication

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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 2025
- Present our estimates of solution provider revenues by CIMdata's defined categories
- Provide insight into investment changes, trends, and market leaders
- Please note: 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 2025 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) that will be available over the next few months
- 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

- Updates from CIMdata
- Overall PLM Market Analysis
- PLM Mindshare Leaders
- Product Innovation Platforms Segment Market Analysis
- Tools Segment Market Analysis
- Concluding Remarks

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### Research Methodology Overview



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 to increase response rate
  - Separate research conducted in China and Japan by strategic partners
  - 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
- CIMdata is always available for a free briefing to get updates on portfolio and performance

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## Update on Modeling Methodologies



Migrating to machine readable data to enable data as a service

- Minor changes to CIMdata market model terminology have been made
- Removed manual calculations moving to a machine-readable data structure that supports storage in a database & more powerful analytics
- Migration may have caused some impact to historical data points
- Using Tableau to create charts: moving towards providing users ability to create custom charts
- Questions on specific charts can be addressed at lunch

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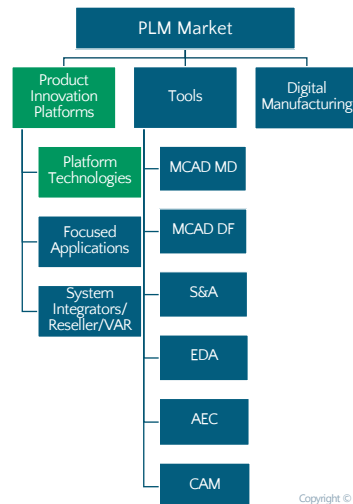
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## Change in Terminology



Changes made in 2026

- “cPDM” and “cPDM Comprehensive” were getting confused
  - cPDM changed to “Product Innovation Platforms”
  - “cPDM comprehensive” changed to “Platform Technologies”
- Definitions have remained the same with minor tweaks
  - To be made available in the upcoming MAR reports
  - Solution providers giving feedback on categorization

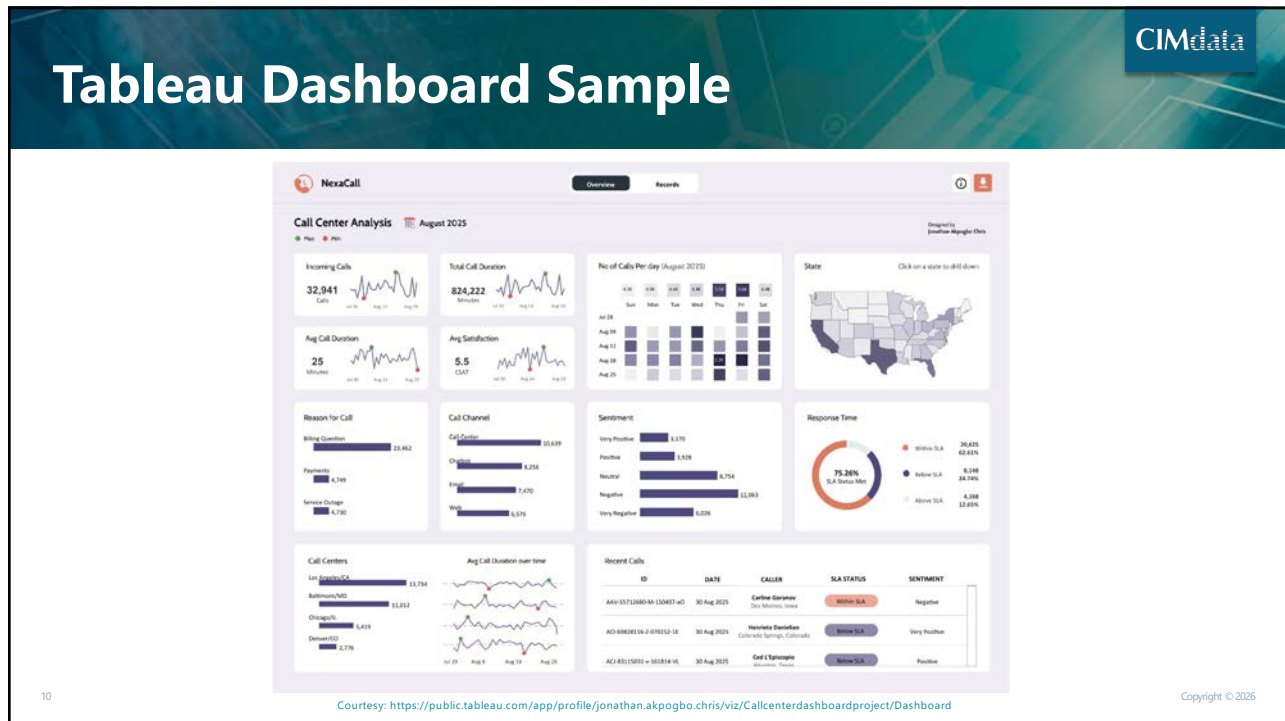
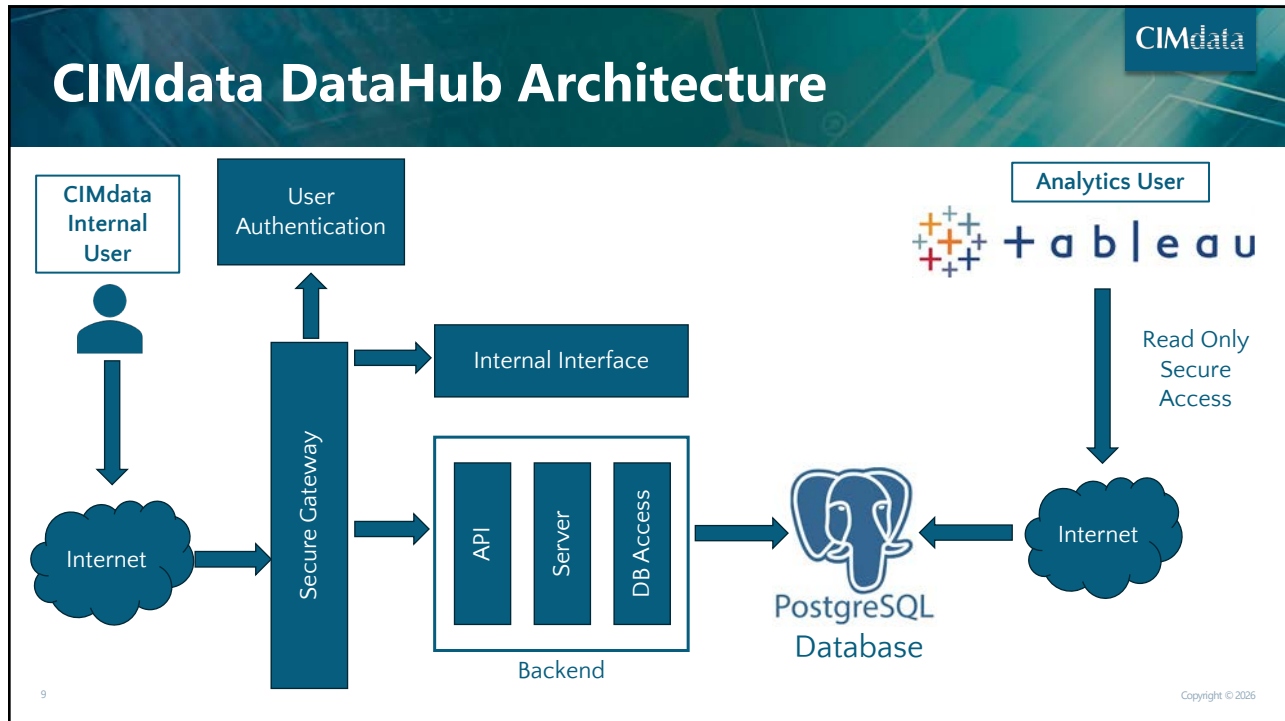


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### Defining PLM

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 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

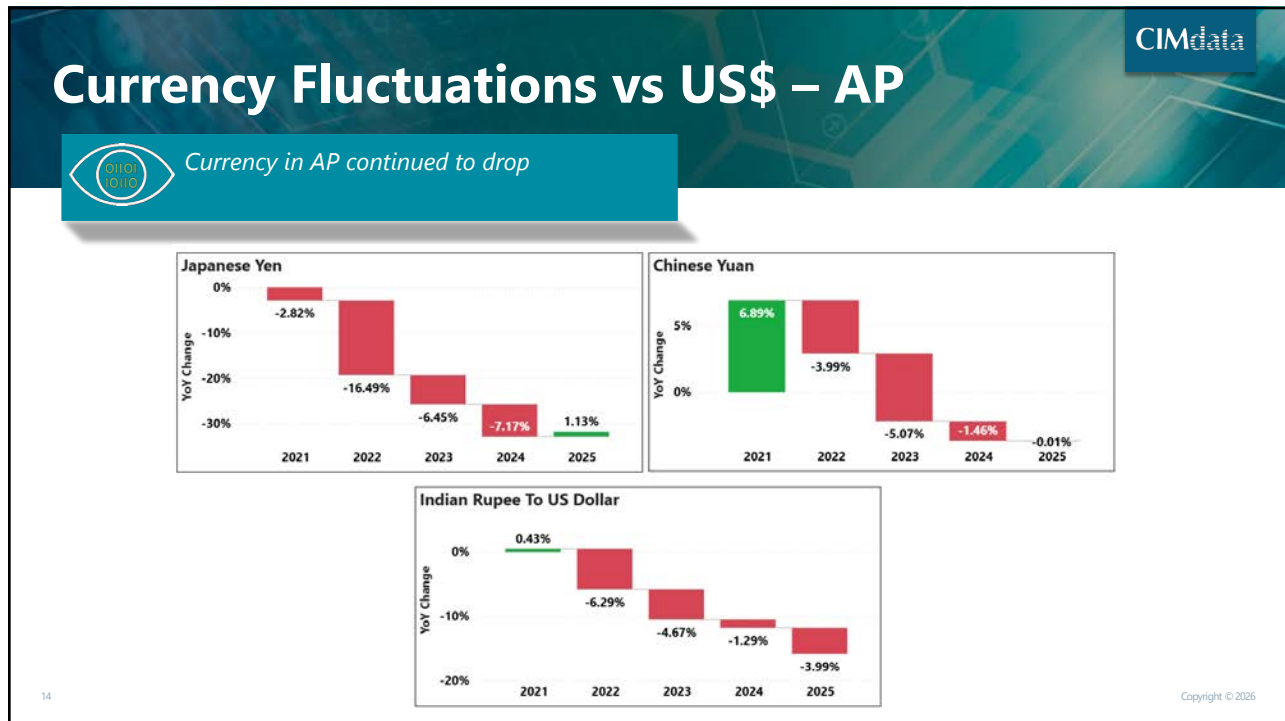
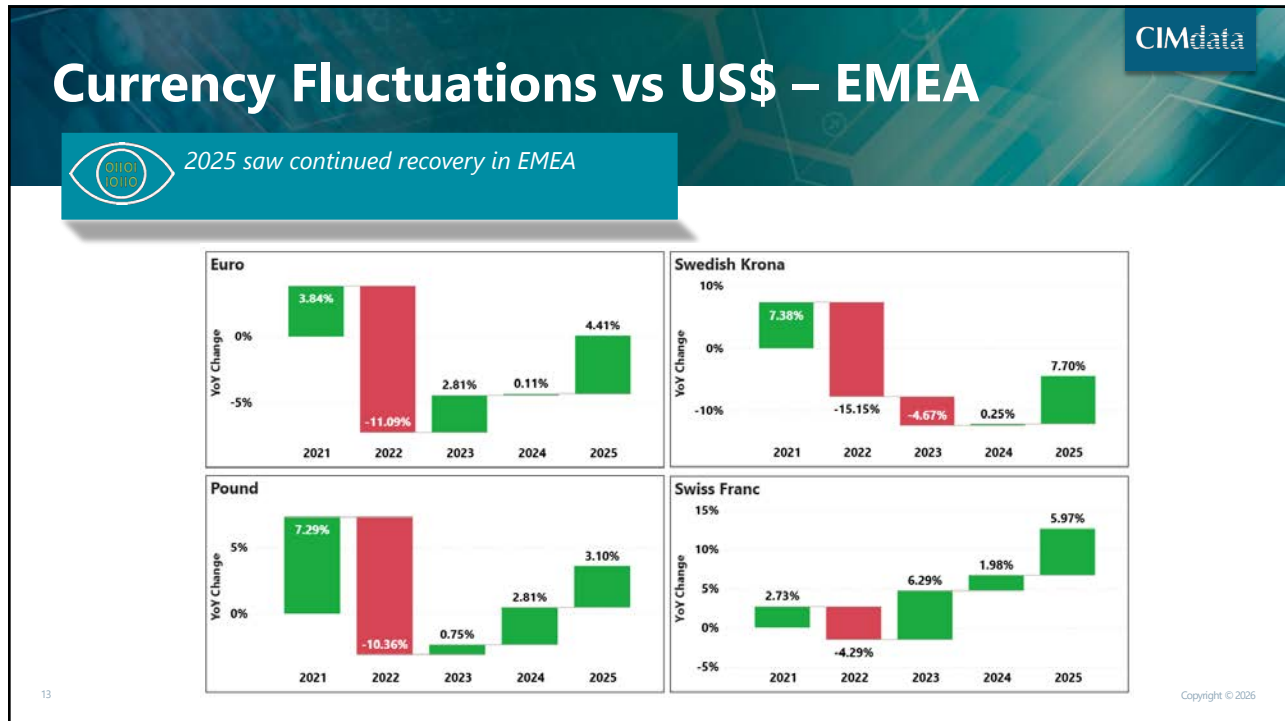


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## Acquisitions in 2025 – S&A



Synopsys/Ansys & Siemens/Altair transactions was completed

### Simulation & Analysis

Acquirer	Target	Technology
Keysight	Synopsys/Ansys	Optical Solutions Group and Ansys PowerArtist
nTop	cloudfluid	Computational fluid dynamics (CFD)
Siemens	Altair	Simulation and Analysis and Data Analytics
	Setmetrics	Technology assets that elevate digital twin technologies
SimuTech Group	Ozen Engineering	Merger of Ansys/Synopsys Partners
Synopsys	Ansys	Simulation and Analysis

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## Acquisitions in 2025 – CAM



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

### CAM

Acquirer	Target	Technology
Sandvik	FASTech	Mastercam Reseller
	Barefoot CNC	Mastercam Reseller
	CAD/CAM Solutions	Mastercam Reseller
	CamTech Engineering Services	Mastercam Reseller
	ShopWare	Mastercam Reseller
	MCAM Northwest	Mastercam Reseller
	OptiPro Systems	Mastercam Reseller
	QTE Manufacturing Solutions	Mastercam Reseller

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### Acquisitions in 2025 – EDA



M&A led growth strategies continue

EDA		
Acquirer	Target	Technology
Accenture	SYSTEMA	Software solutions and consulting services for EDA manufacturing automation
Altium	Part Analytics	AI-powered supply chain management platform
Cadence	Secure-IC	Embedded security IP platform provider
	Arm	Artisan foundation IP business
Siemens	Excellicon	Software for the development, verification, and management of timing constraints
	DownStream Technologies	Manufacturing data preparation solutions for printed circuit board (PCB) design

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### Acquisitions in 2025 – CAD



Digitalization increases

CAD		
Acquirer	Target	Technology
Cadence	Hexagon Design and Engineering	Simulation and Analysis, Manufacturing simulation, Material data (Including MSC Software) Design and Engineering
Hexagon	CAD Service	Advanced visualization tools used to integrate computer-aided design (CAD) drawings, BIM models, and Reality Capture data into HxGN EAM
	3D Systems Geomagic	Geomagic Software portfolio

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## Acquisitions in 2025 – Platform Technologies


 Continued consolidation

Platform Technologies		
Acquirer	Target	Technology
Accenture	AOX	Embedded software for carmakers and their suppliers
Addnode	TPM Inc	Partners with Autodesk and Bluebeam
	Repro Products	Autodesk software and services
	X10D Solutions	Dassault Systèmes Partner
	Solidcad	Autodesk Platinum Partner
	FF Solutions	Autodesk Partner
	PRIME Aerostructures	Dassault Systèmes Consulting and Services
Bamboo Rose	Verteego	Automation platform focused on supply chain decision intelligence
Bechtle	Nuovamacut	Dassault Systèmes SOLIDWORKS partner
CONTACT Software	neusta mobile solutions GmbH	Mobile Applications

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## Acquisitions in 2025 – Platform Technologies

 Continued consolidation

Platform Technologies		
Acquirer	Target	Technology
Dassault Systèmes	Ascon Systems Holding GmbH	Ascon Qube technology
GoEngineer	CAD MicroSolutions	Dassault Systèmes SOLIDWORKS reseller
IBM	Applications Software Technology	Oracle Consultancy
	Cognitus	SAP S/4HANA services provider
IFS	TheLoops	Autonomous AI agent technology
	7bridges	AI-powered supply chain management
	Softeon	Cloud-native WMS, Warehouse Execution and Distributed Order Management solutions
PTC	IncQuery Group	Application lifecycle management (ALM) and systems engineering development and consultancy services
Siemens	Dotmatics	Life Sciences R&D software

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### Acquisitions by Private Equity Firms



Broad market

Private Equity		
Acquirer	Target	Technology
Bencis	Cadac Group	Autodesk Partner, AEC Automation Software
Main Capital Partners	Trace One	PLM and compliance solutions tailored to the food & beverage, cosmetics & personal care, and chemical industries
Peak Rock Capital	Aegis Industrial Software	Manufacturing execution system ("MES") software
Thoma Bravo	PROS Holdings	AI-powered SaaS pricing and selling solutions
TPG	Specific PTC solutions	Kepware and ThingWorx businesses

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### Acquisitions in 2025



Broad market

Other Notable		
Acquirer	Target	Technology
AMETEK	FARO Technologies	3D measurement and imaging solutions
Aptean	Vlexgroup AG	Variant-manufacturing focused ERP
Centric Software	Contentserv	Product information management (PIM) and product experience management (PXM) solutions
Emerson	Aspen Technology	Asset Management Software
NetDocuments	OpenText	On-premise solution (eDOCS), a part of its Analytics portfolio
Roima Intelligence	Tillit	Digital manufacturing execution

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## Changes in Market Sample



Looking to dive deeper into 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
- Beyond acquisitions, in any given year, we may add several companies to our analysis
  - They will contribute to the overall trends but usually don't affect the total market size

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## PLM Market Categories



Three major segments comprise the PLM Market

- Product Innovation Platforms
  - Applications & solutions that capture, manage, disseminate, visualize and collaborate on product related intellectual assets, 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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Revenues presented are CIMdata estimates

### 2025 Market Results

Segment	2025 Revenues (USD Millions)	Actual YoY Growth	Forecasted 2025 Growth
<b>Product Innovation Platforms*</b>	<b>\$30,501</b>	<b>8.1%</b>	<b>9.3%</b>
Platform Technologies#	\$11,941	8.9%	7.1%
Focused Applications (includes Other Tools)	\$6,059	7.9%	6.6%
SI/Reseller/VAR	\$12,501	7.5%	12.6%
<b>Tools</b>	<b>\$55,701</b>	<b>9.2%</b>	<b>9.4%</b>
MCAD-Multi-Discipline	\$4,586	5.8%	4.3%
MCAD-Design-Focused	\$5,163	6.5%	6.9%
Non-Bundled CAM	\$2,030	6.8%	6.0%
Simulation & Analysis^	\$11,678	8.5%	10.7%
EDA	\$21,047	9.4%	10.0%
AEC	\$11,197	14.4%	11.1%
<b>Digital Manufacturing</b>	<b>\$1,072</b>	<b>2.8%</b>	<b>4.7%</b>
<b>Total</b>	<b>\$87,275</b>	<b>8.7%</b>	<b>9.3%</b>

25 \*Previously cPDM #Previously Comprehensive cPDM ^Minor Adjustment in portfolio Copyright © 2026

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### Overall PLM Results

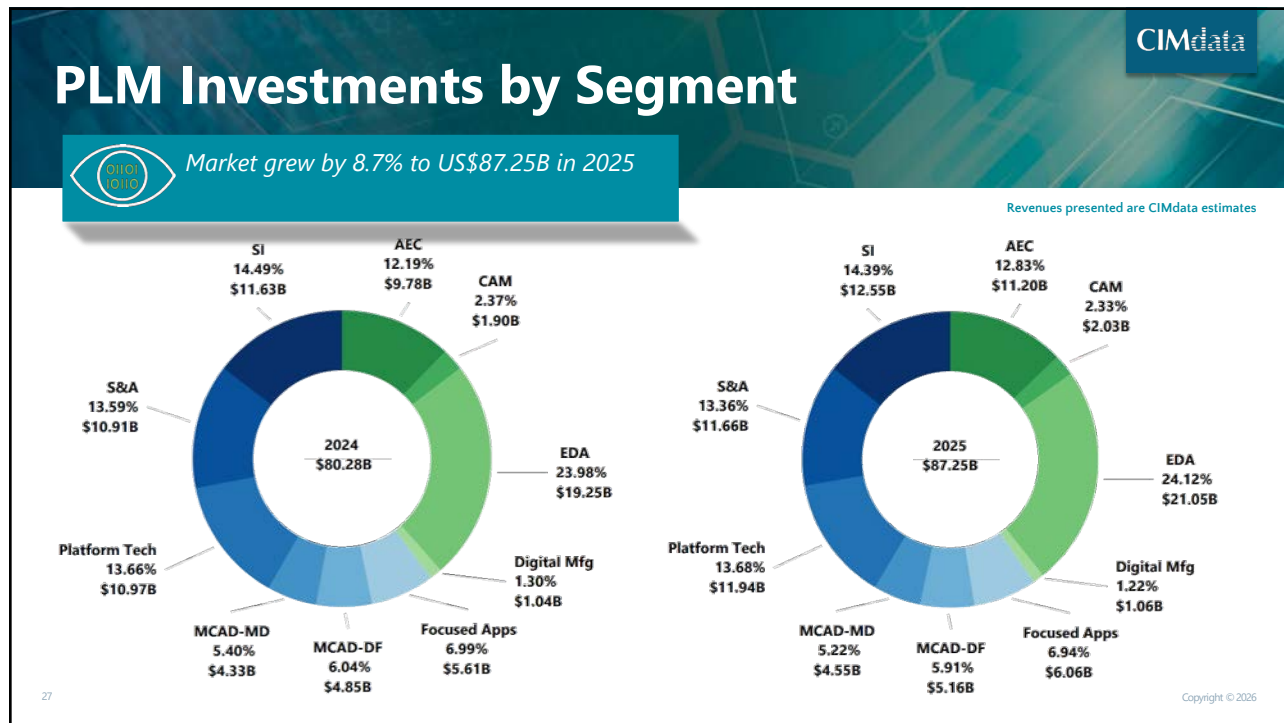

Growth in 2025 above forecast

- Overall PLM growth (8.7%) below forecast (9.3%)
- A strong year for AEC followed by EDA
- Surprisingly, Platform Technologies grew above forecast at 8.9%
- Weaker year for S&A than expected ~8.5%
- Continued industry consolidation, new entrants and increased investor interest
- Many companies buying up their VARs
- Major PLM players trying to differentiate, expand reach

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**Market Forecasts – 2026-2030**

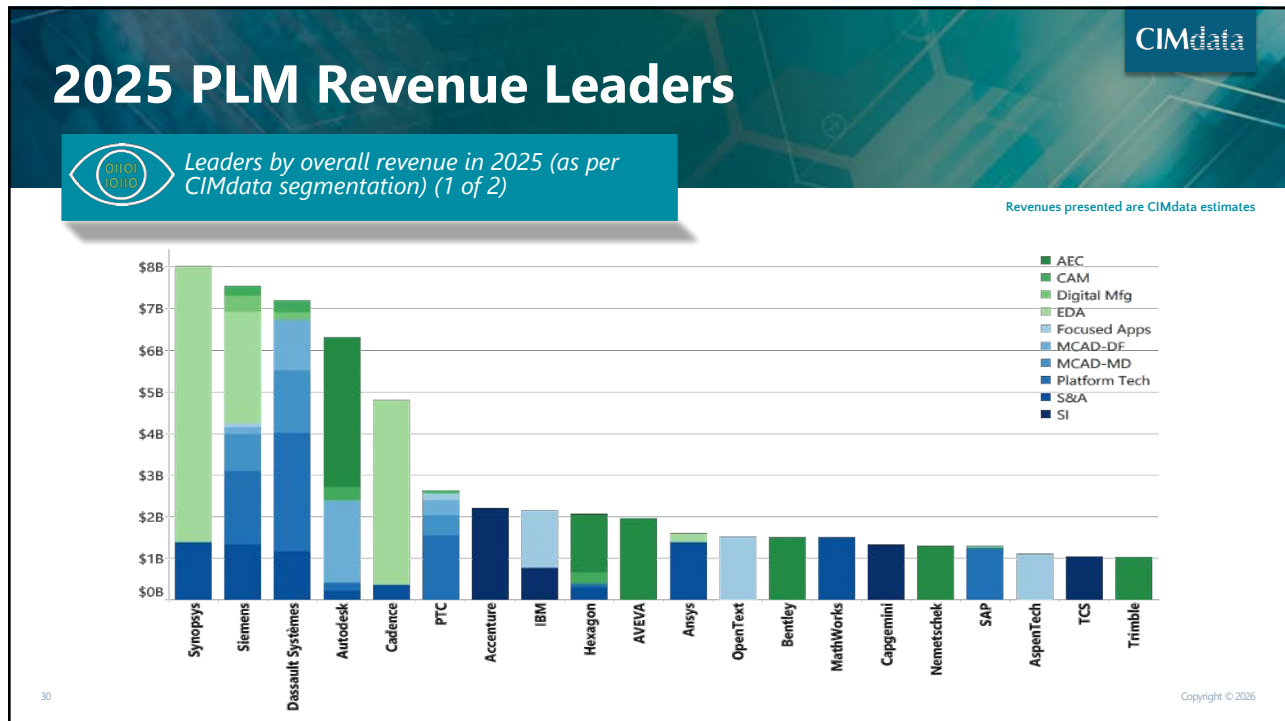
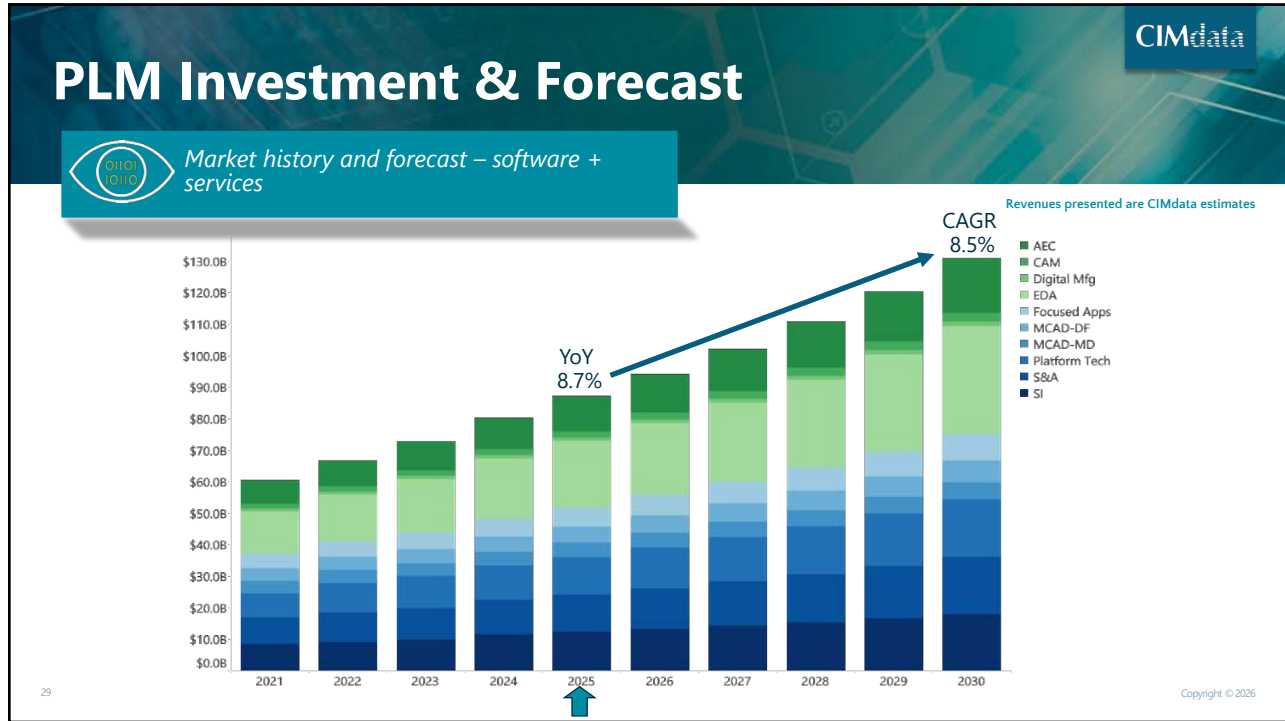
Revenues presented are CIMdata estimates

Segment	2026 Estimate (USD Millions)	YoY Growth	5 Year CAGR
<b>Product Innovation Platforms*</b>	<b>\$32,857</b>	<b>7.5%</b>	<b>7.7%</b>
Platform Technologies#	\$13,011	9.0%	8.7%
Focused Applications (includes Other Tools)	\$6,458	6.6%	6.2%
SI/Reseller/VAR	\$13,388	7.0%	7.5%
<b>Tools</b>	<b>\$60,293</b>	<b>8.4%</b>	<b>8.9%</b>
MCAD-Multi-Discipline	\$4,714	3.6%	3.8%
MCAD-Design-Focused	\$5,468	6.0%	6.2%
Non-Bundled CAM	\$2,168	6.8%	6.6%
Simulation & Analysis	\$12,775	9.6%	9.5%
EDA	\$22,910	8.9%	10.3%
AEC	\$12,257	9.5%	9.2%
<b>Digital Manufacturing</b>	<b>\$1,131</b>	<b>6.7%</b>	<b>6.7%</b>
<b>Total</b>	<b>\$94,281</b>	<b>8.1%</b>	<b>8.5%</b>

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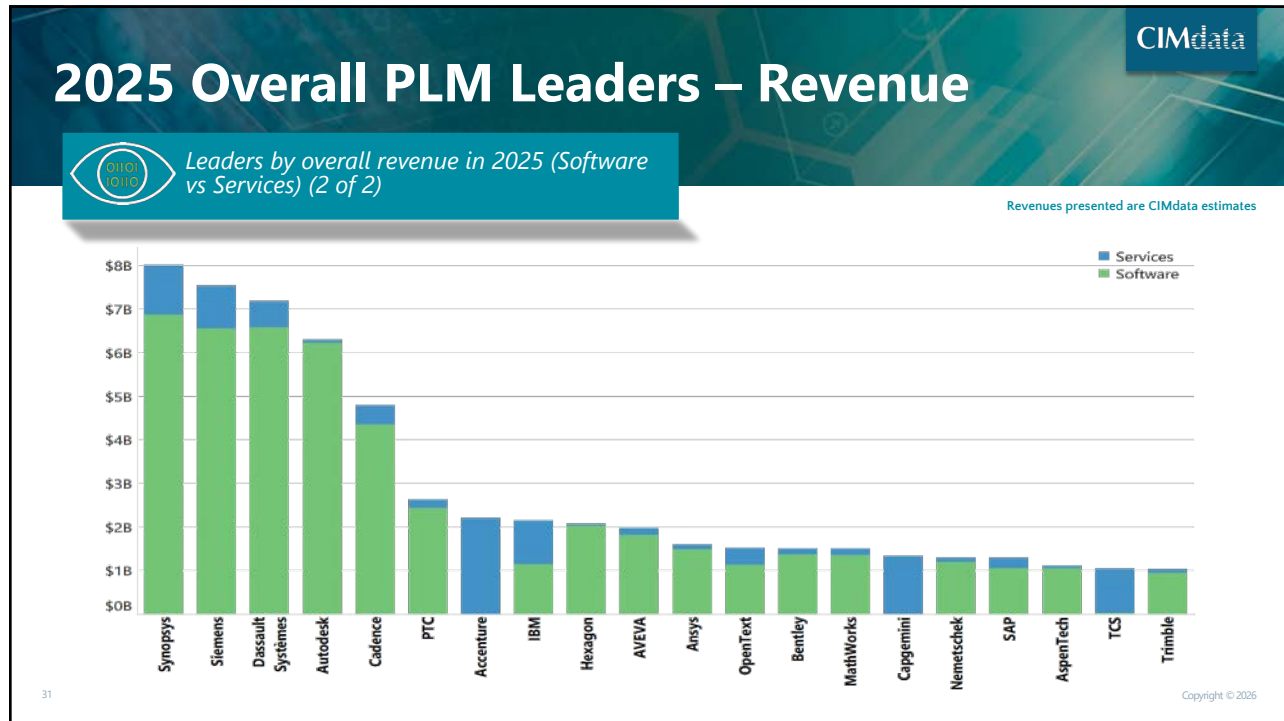
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**Overall PLM Market Revenue Leaders**

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
- Now twenty-six companies over \$1B in revenue in 2025 (was 13 in 2021)
  - 3 EDA
  - 6 AEC
  - 4 Platform Technologies
  - 3 SI/Reseller/VAR
  - 5 S&A
  - 3 Focused Apps
  - 2 MCAD

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## Scope of PLM 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-premises interconnection becoming more common
- More IoT data needs to be analyzed, with results fed back to multiple systems
- As ISVs move to Direct sales competition for service is accelerating

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### PLM Mindshare Leaders



Who do people think about?

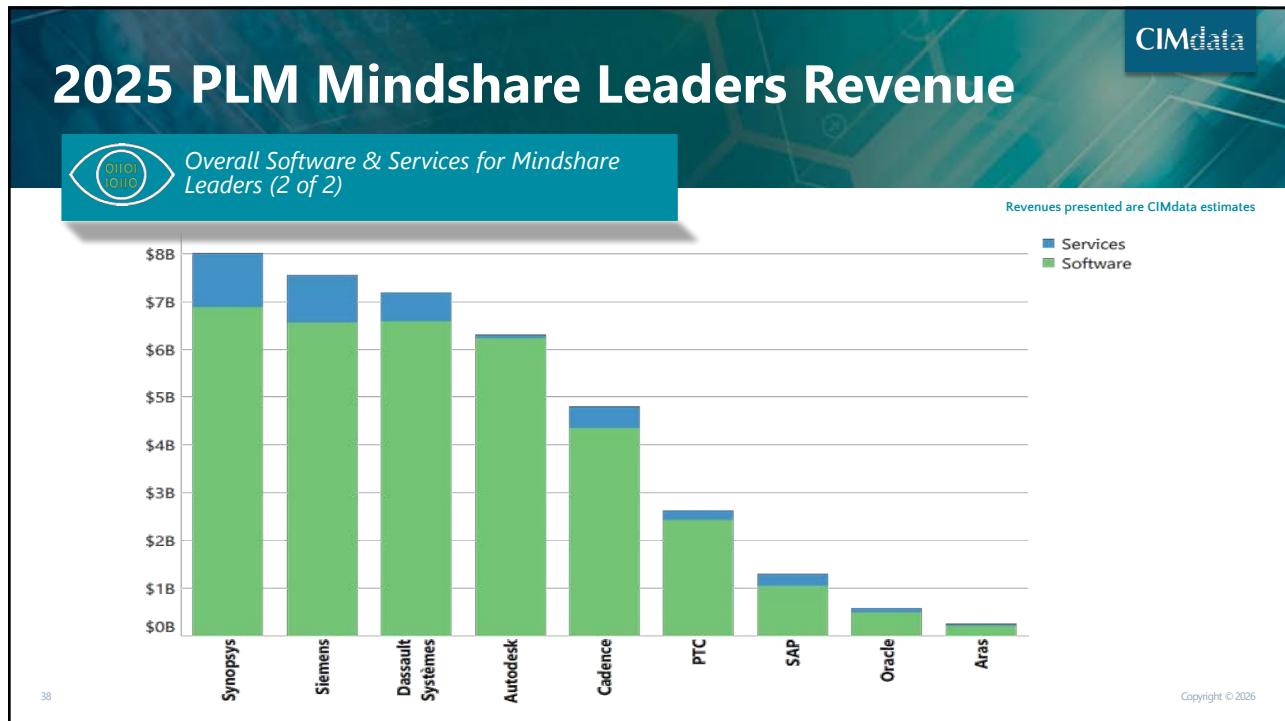
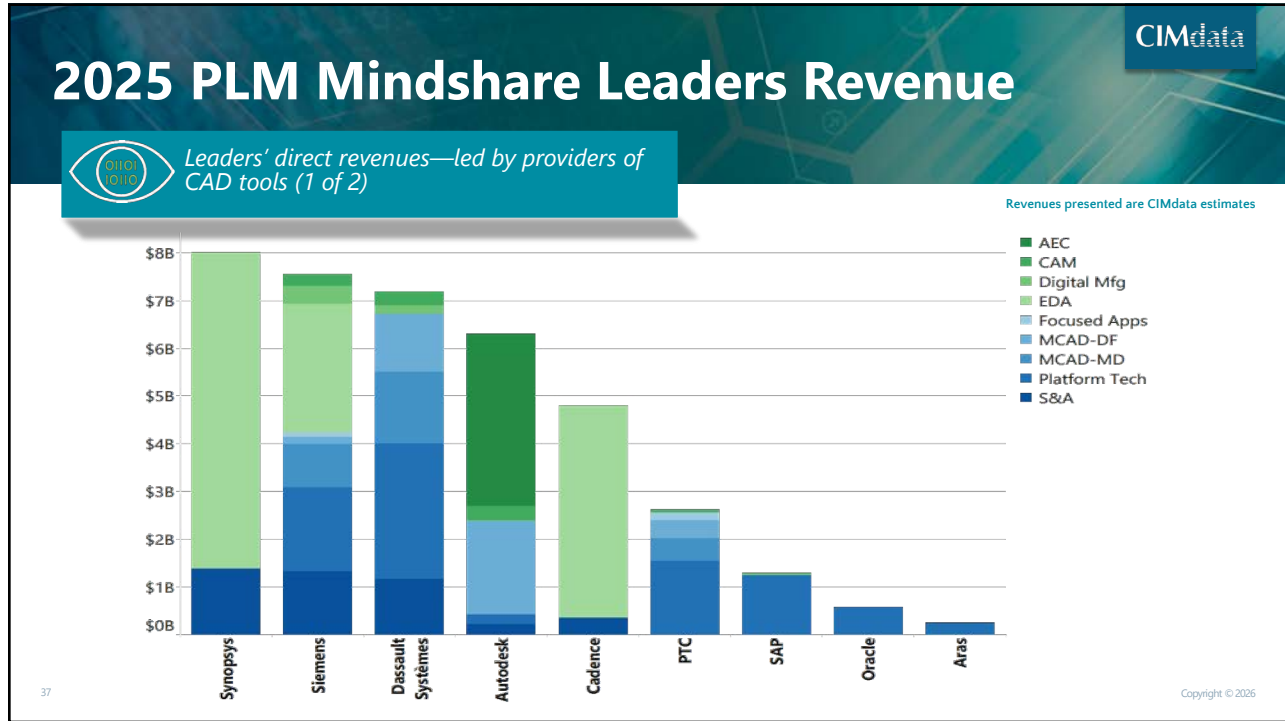
- These companies are perceived as leading the market
  - Number, size, and scope of implementations
  - Technology and thought leadership
- Most are comprehensive, lifecycle-focused providers
  - Some are leaders in the PDM market
  - Some also provide tools – primarily MCAD and S&A
- EDA providers are busy building “Silicon to Systems” portfolio and are new additions to the group
  - Attracted everyone’s attention by being at the center of the AI’s five-layer cake

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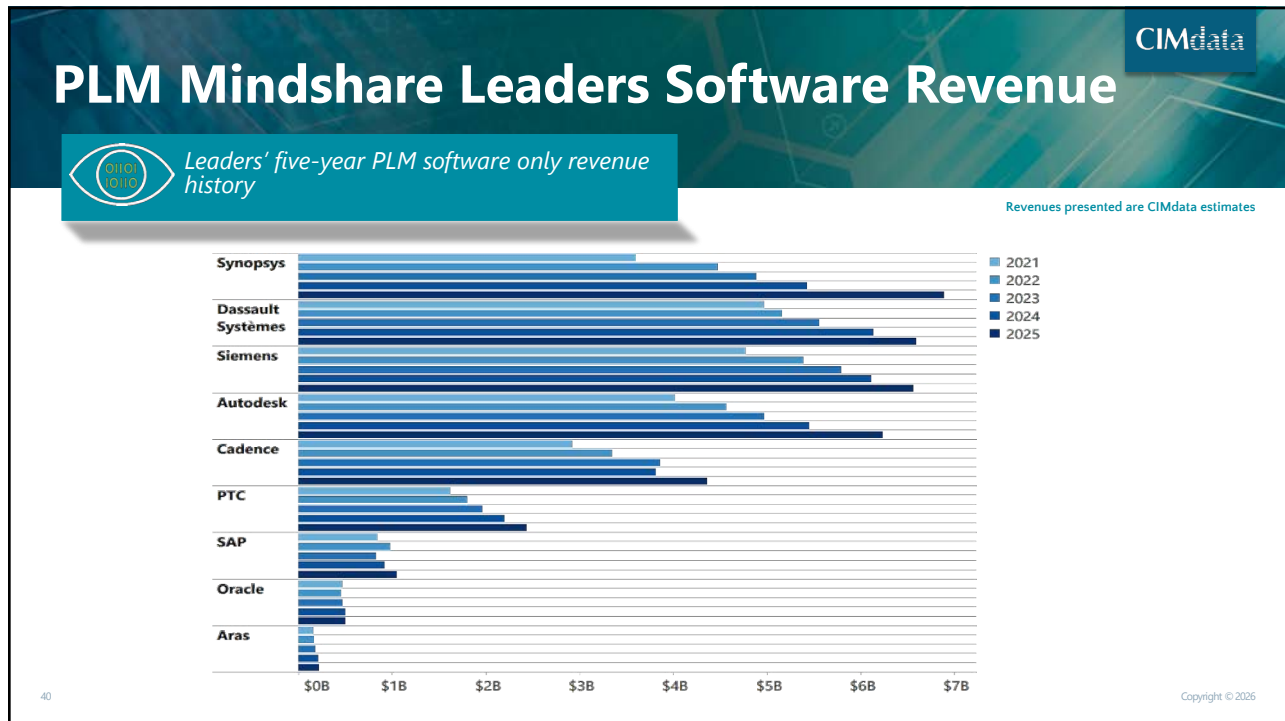
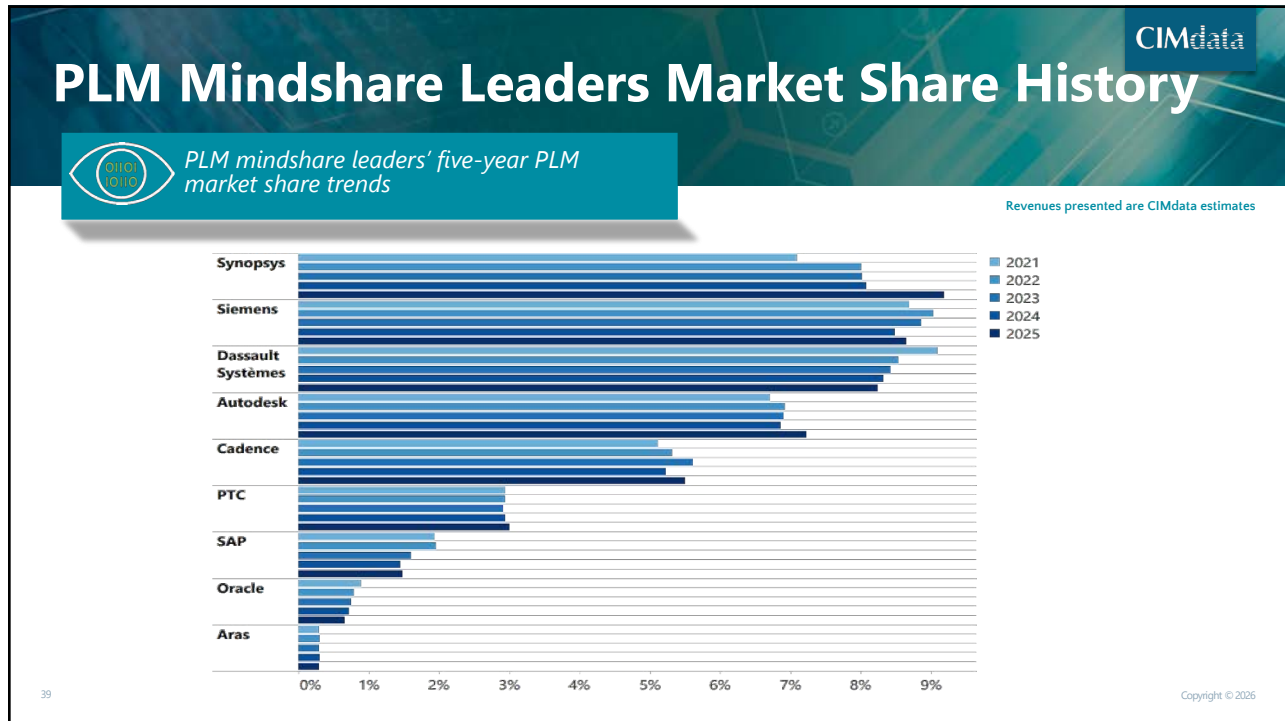
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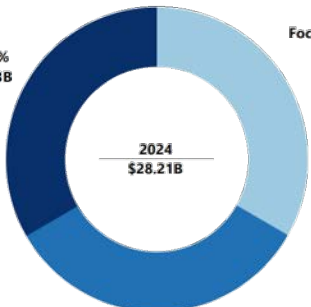
### Product Innovation Platforms Revenue



Growth Rates: Platform Tech: 8.87%, Focused Apps: 7.48%, SI: 7.91%

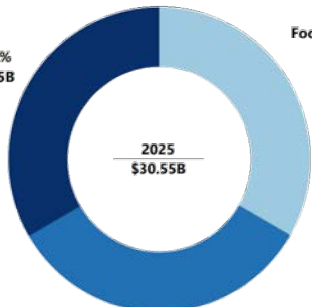
Revenues presented are CIMdata estimates

**2024**  
\$28.21B



Segment	Percentage	Revenue
SI	41.23%	\$11.63B
Platform Tech	38.87%	\$10.97B
Focused Apps	19.90%	\$5.61B

**2025**  
\$30.55B

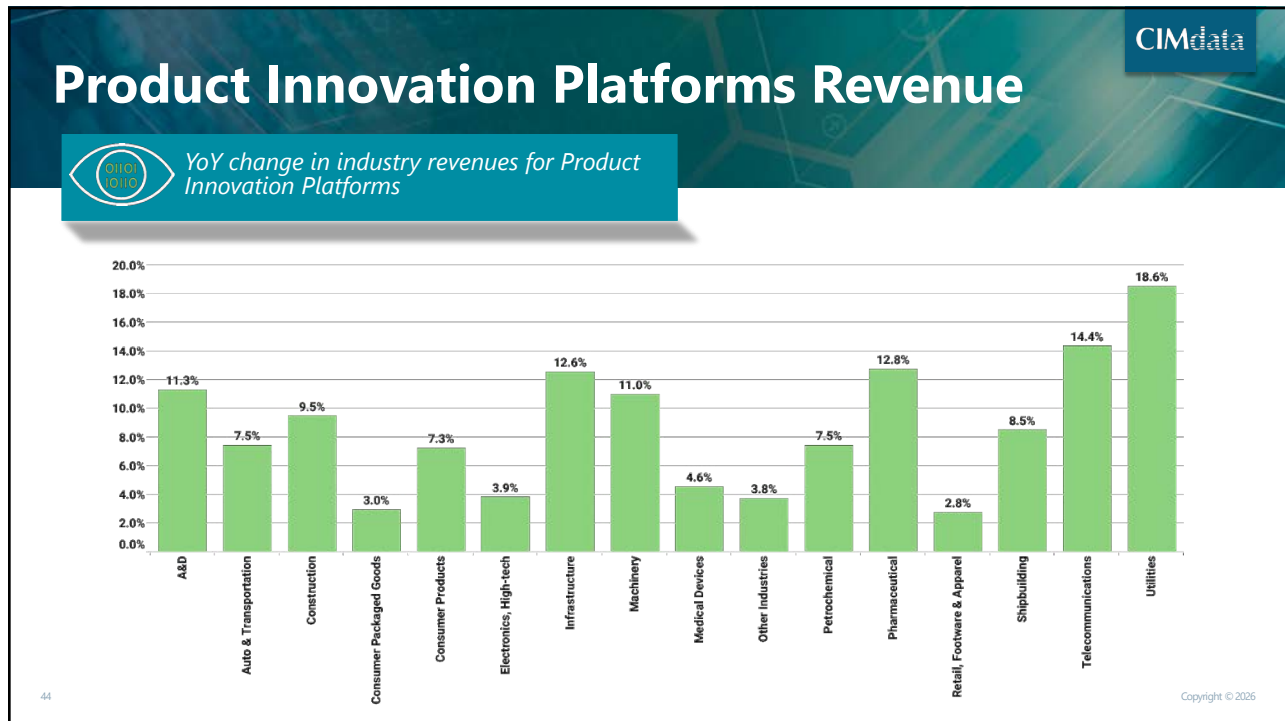
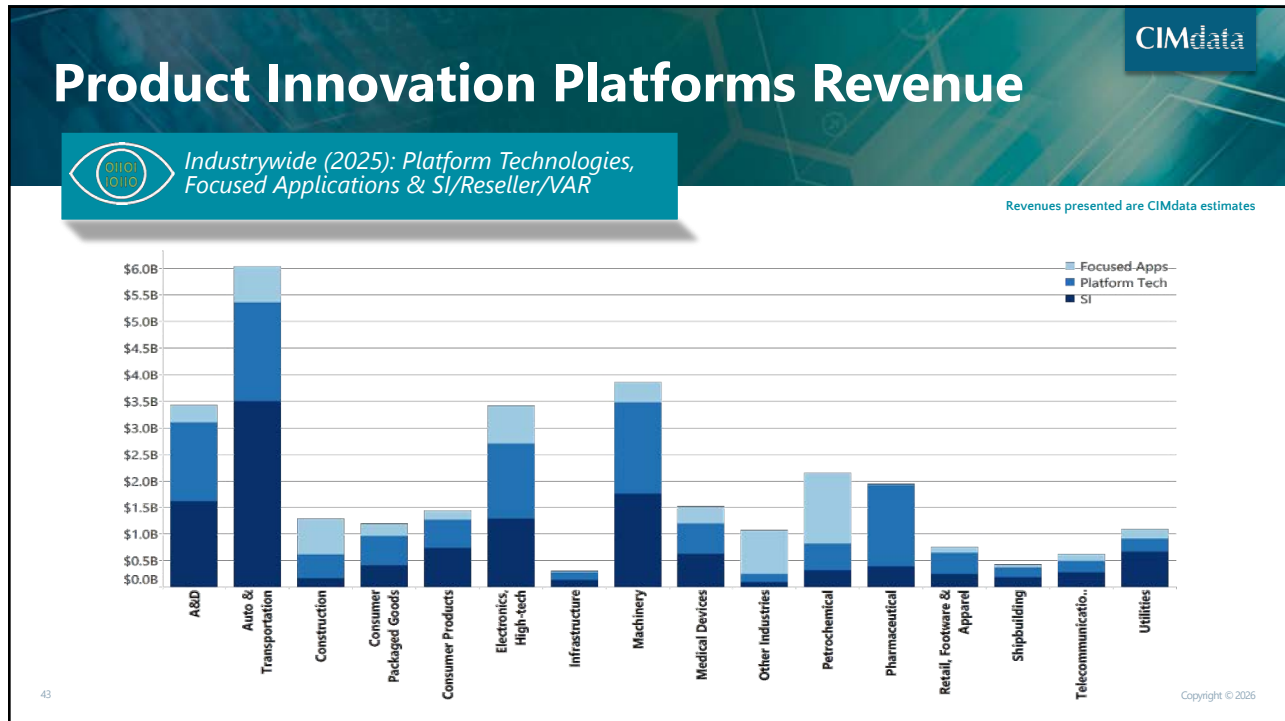


Segment	Percentage	Revenue
SI	41.09%	\$12.55B
Platform Tech	39.08%	\$11.94B
Focused Apps	19.83%	\$6.06B

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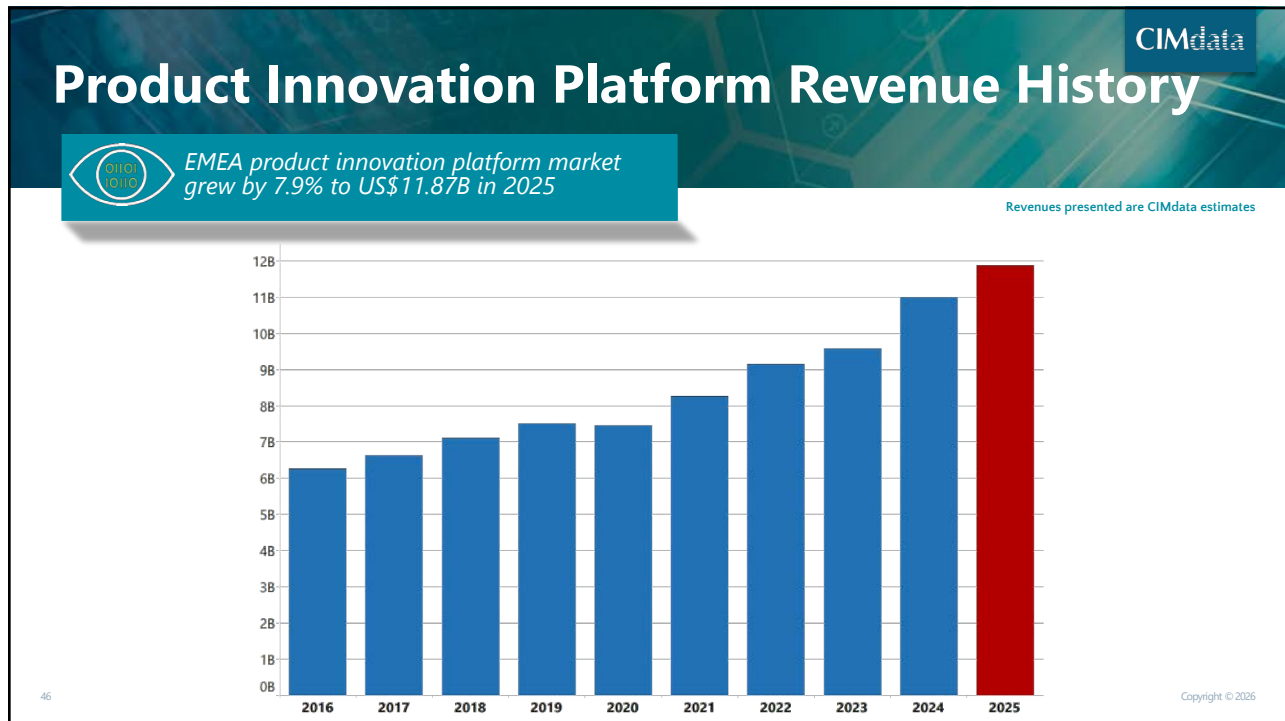
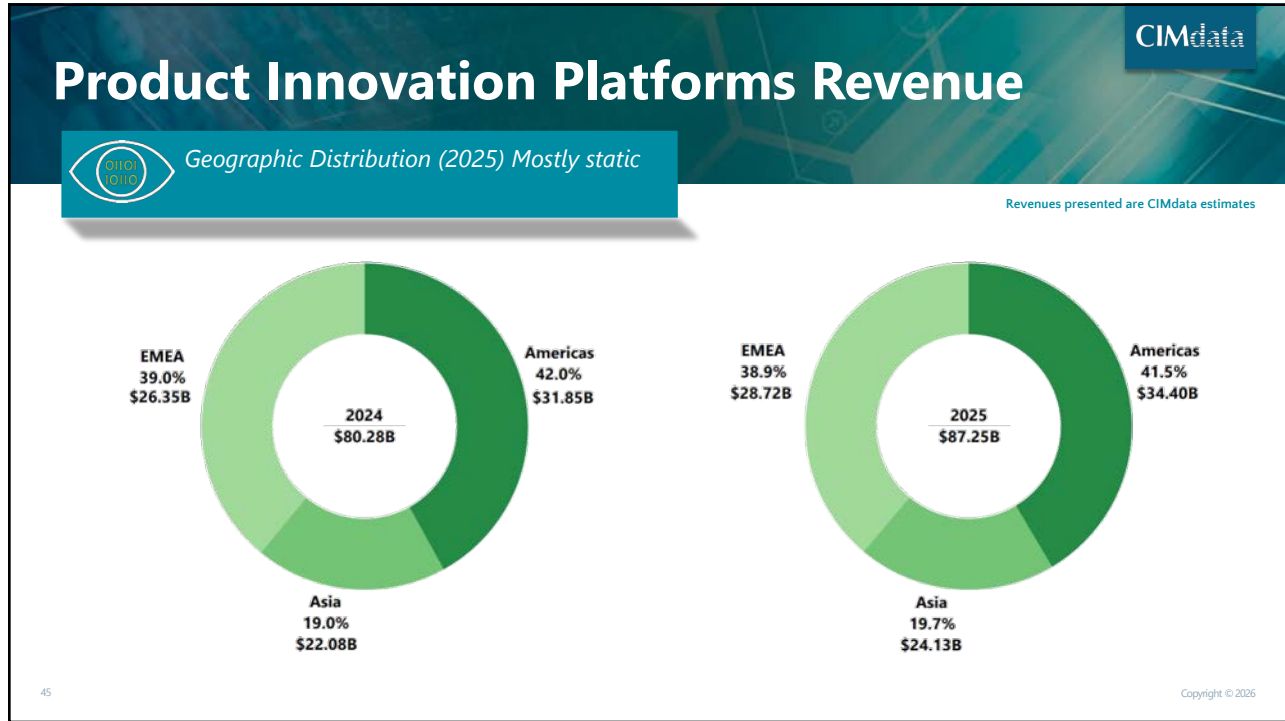
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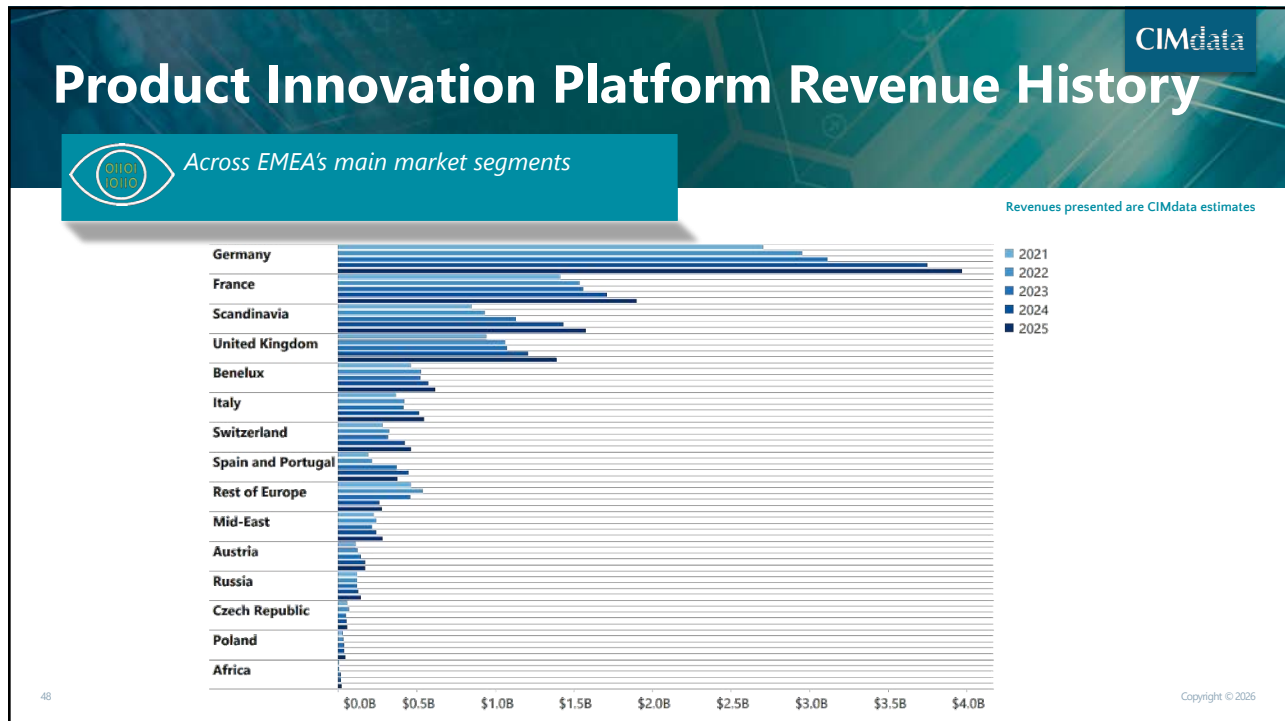
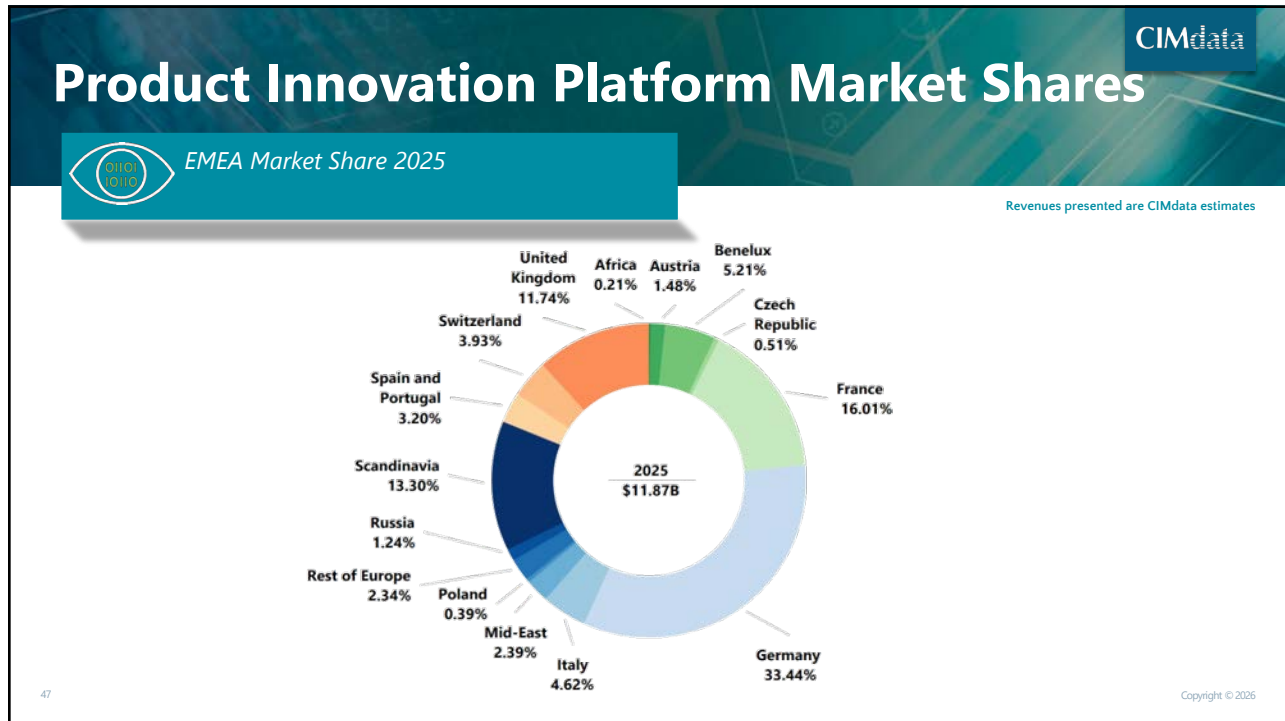
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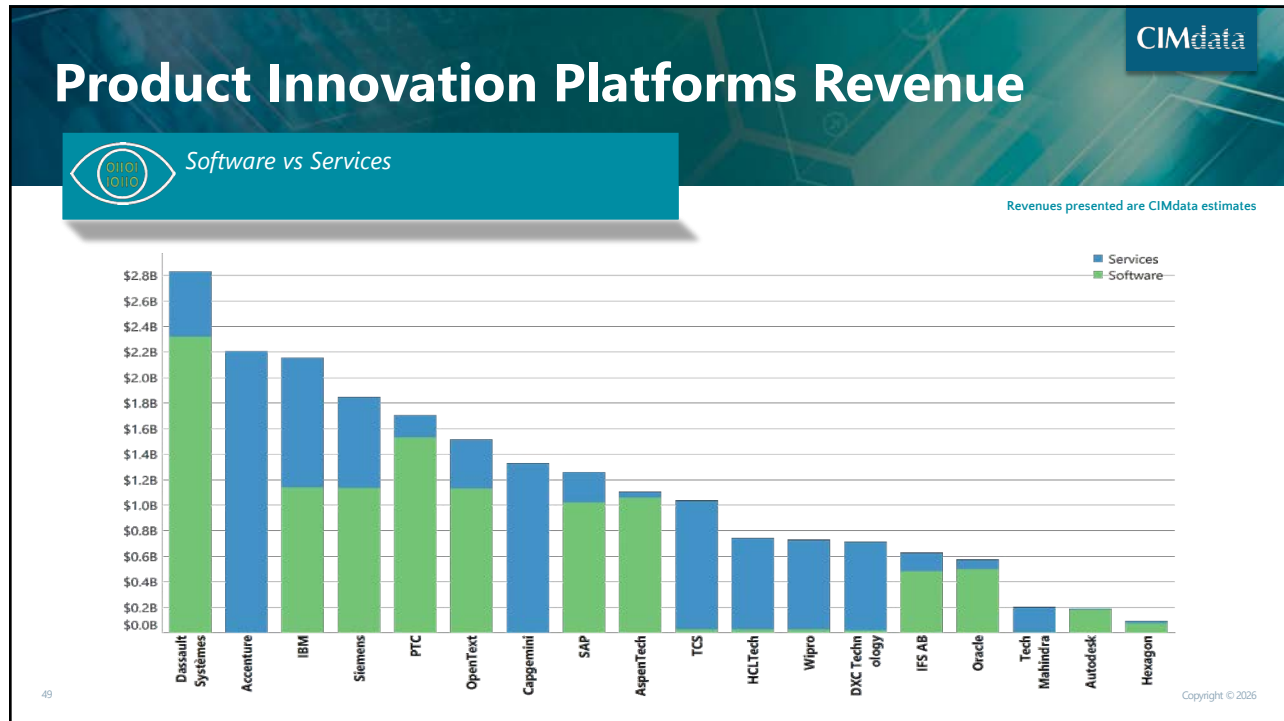
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### Revenue Ratios – Software vs. Services

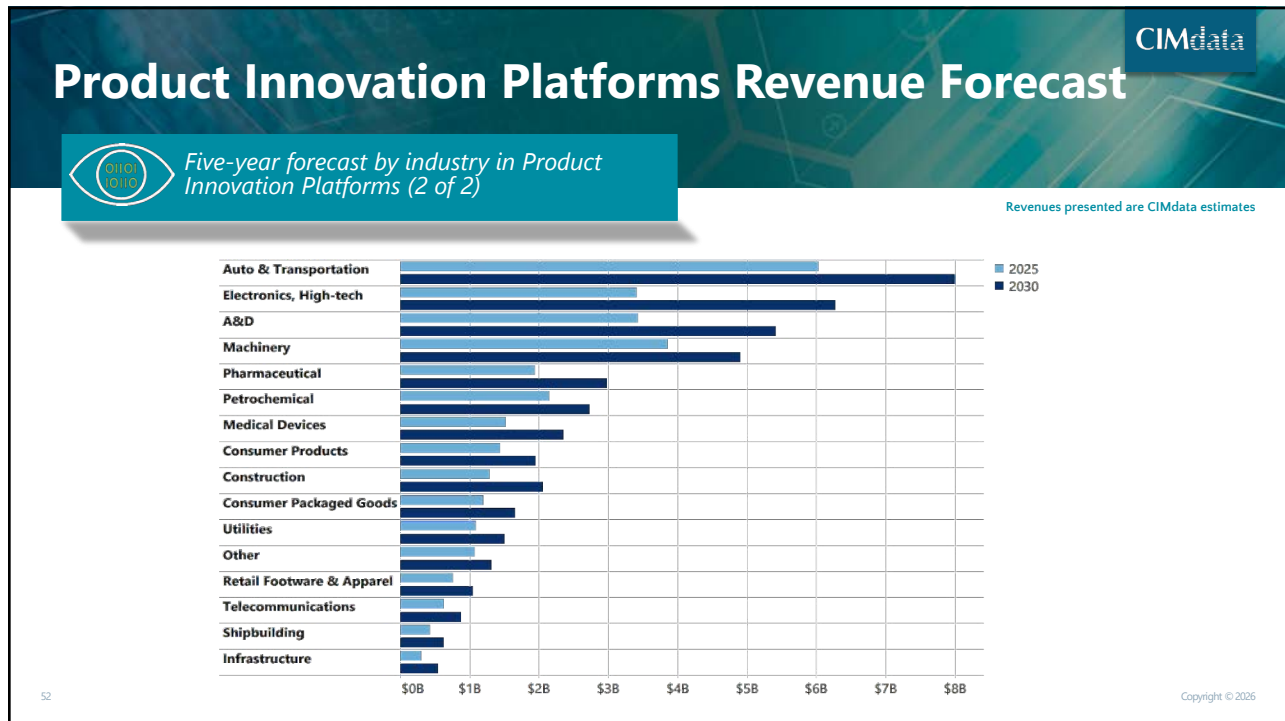
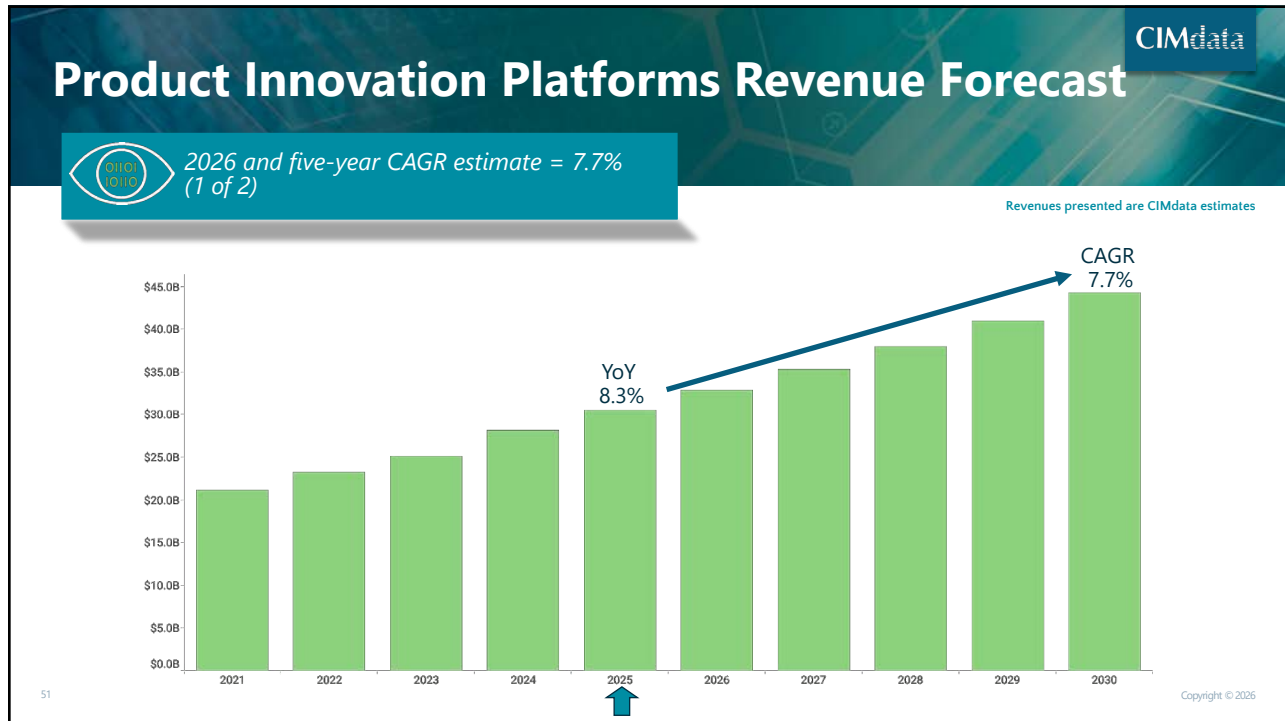
Services is a major revenue area

- Overall Total Product Innovation Platform market: Services are 46%
  - Driven by independent services providers
- Product Innovation Platform providers only
  - In 2025, Software share of 77.3% (Down from last year, 79.1%)
- Services ratio can change for several reasons
  - Products are being developed, packaged & delivered as bundles to reduce services
  - Cloud-based products often claim to require less services
  - Nature of services changing—more need for skills in advanced PLM topics vs. IT installation & integration
  - AI will have an impact

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## Platform Technologies Provider Analysis



Review of Platform Technologies provider revenue performance

- Platform Technologies segment dominated by “Mindshare” leaders
  - Aras, Autodesk, Dassault Systèmes, Oracle, PTC, SAP, and Siemens
- Other major providers
  - IBM, Infor, and IFS
  - CONTACT Software, Propel, and NEC (who is 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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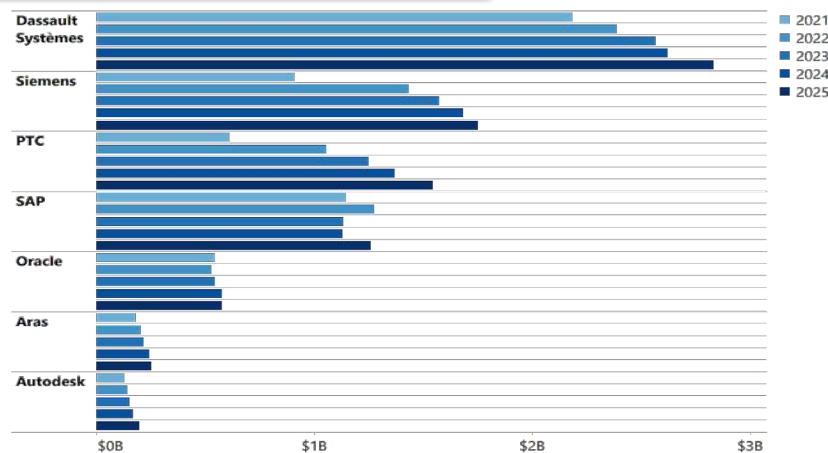
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## Platform Technologies Leaders History



Leaders' five-year Platform Technology Provider trends (1 of 2)

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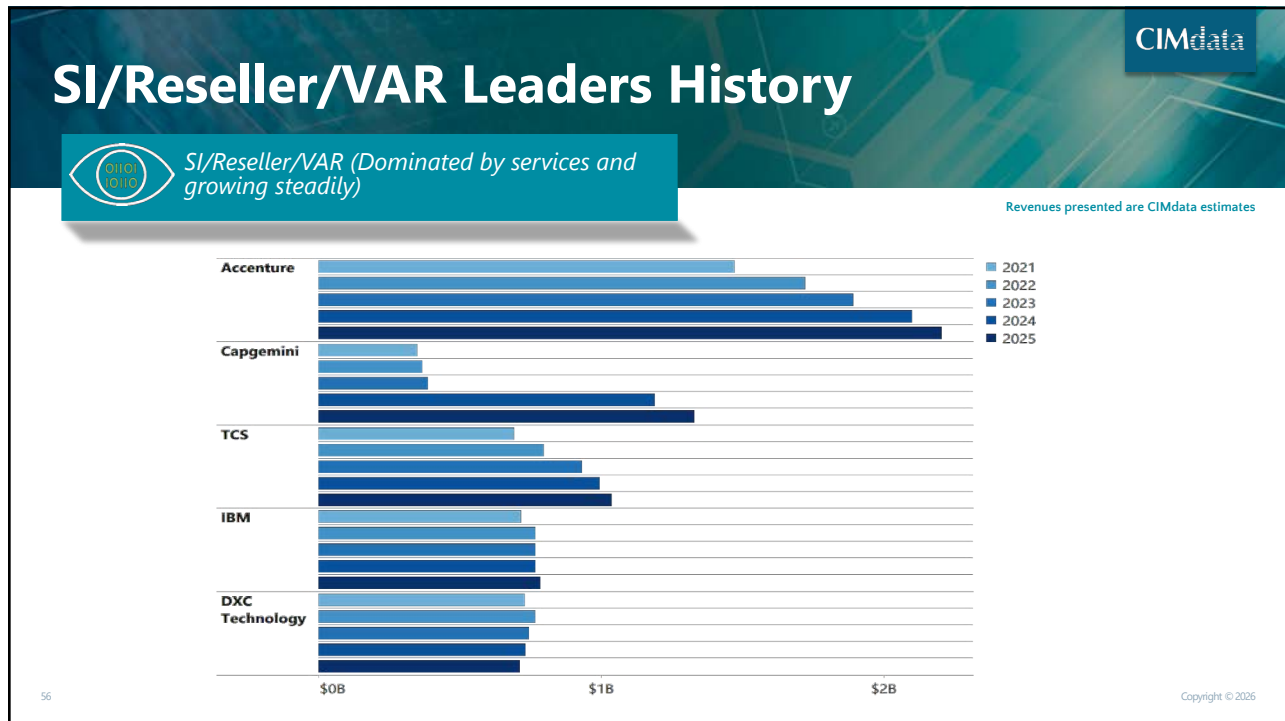
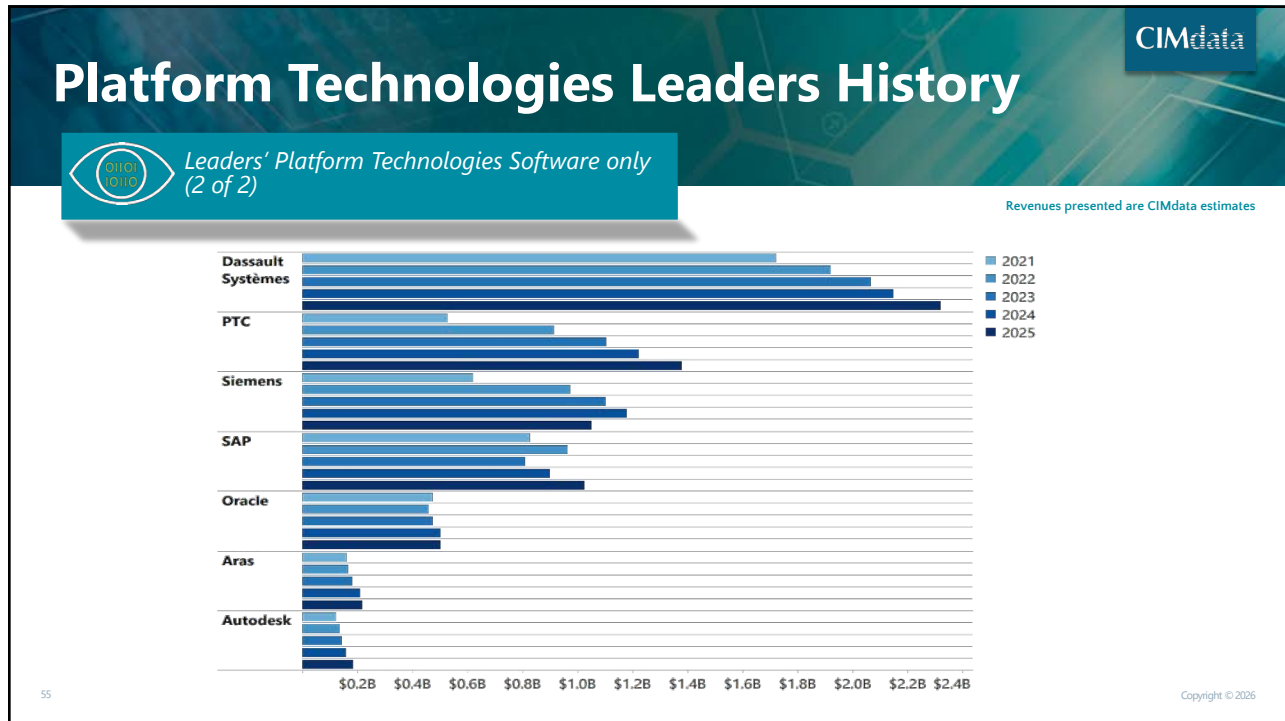


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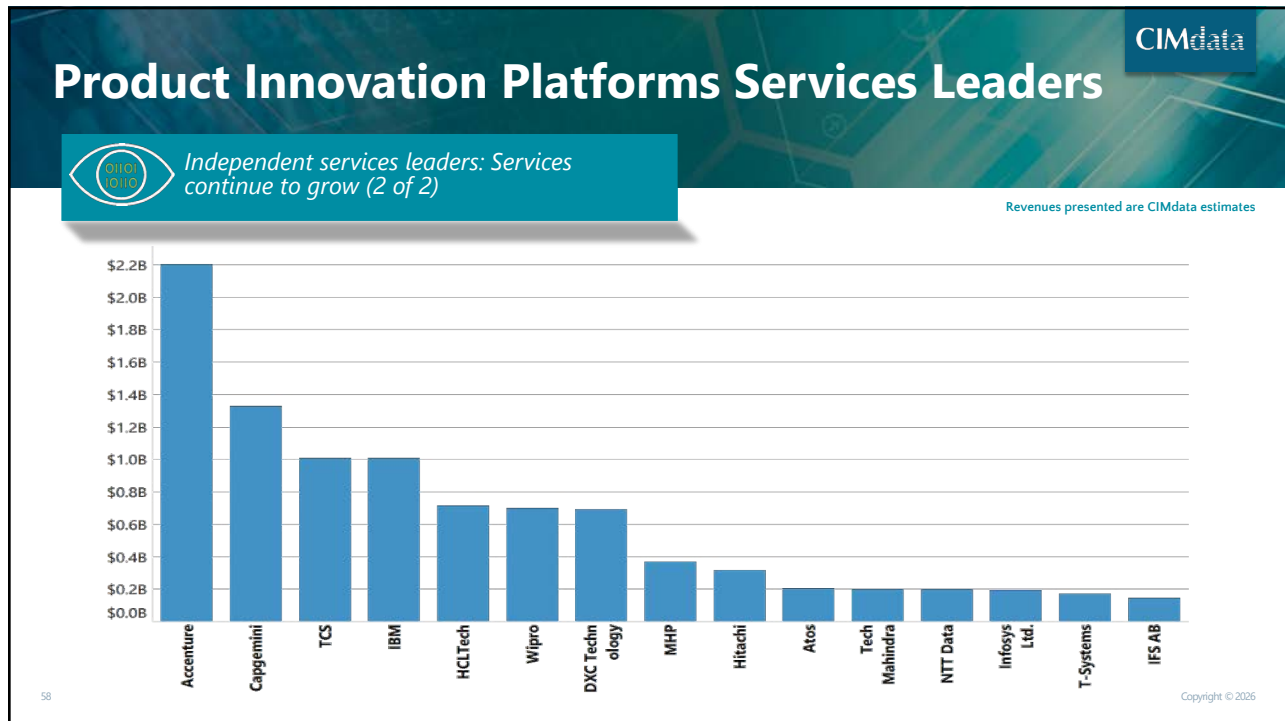
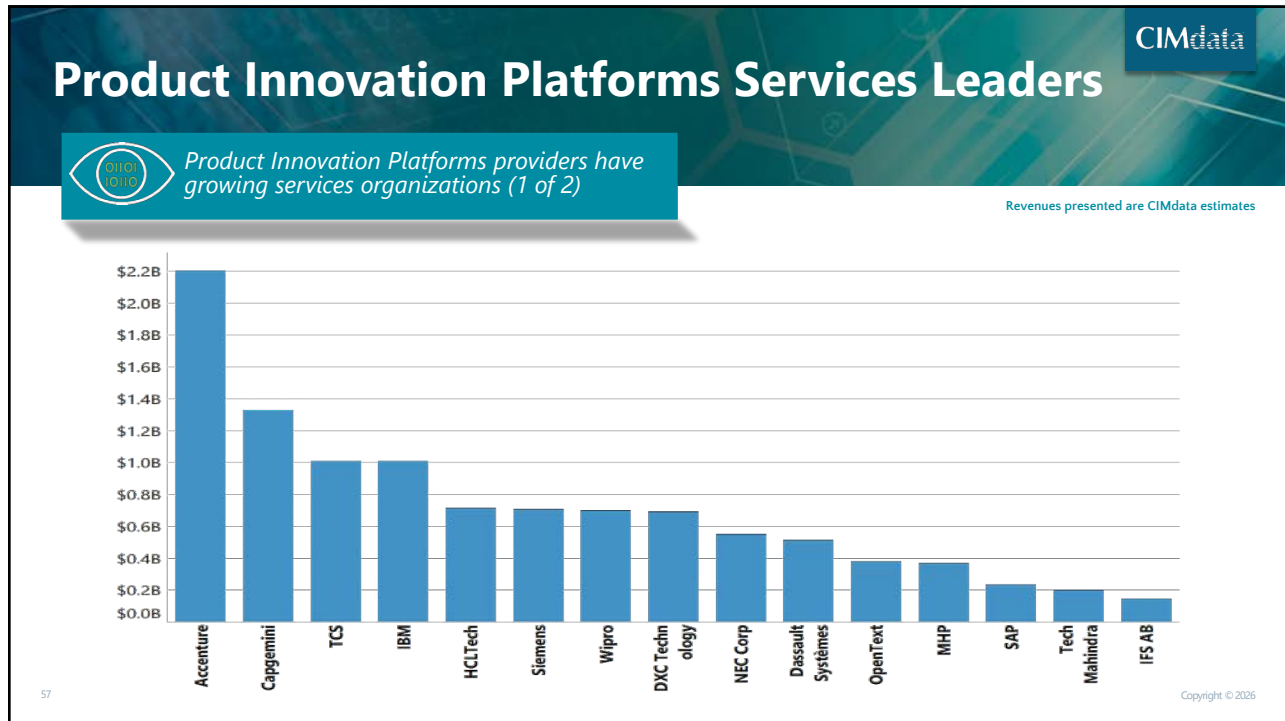
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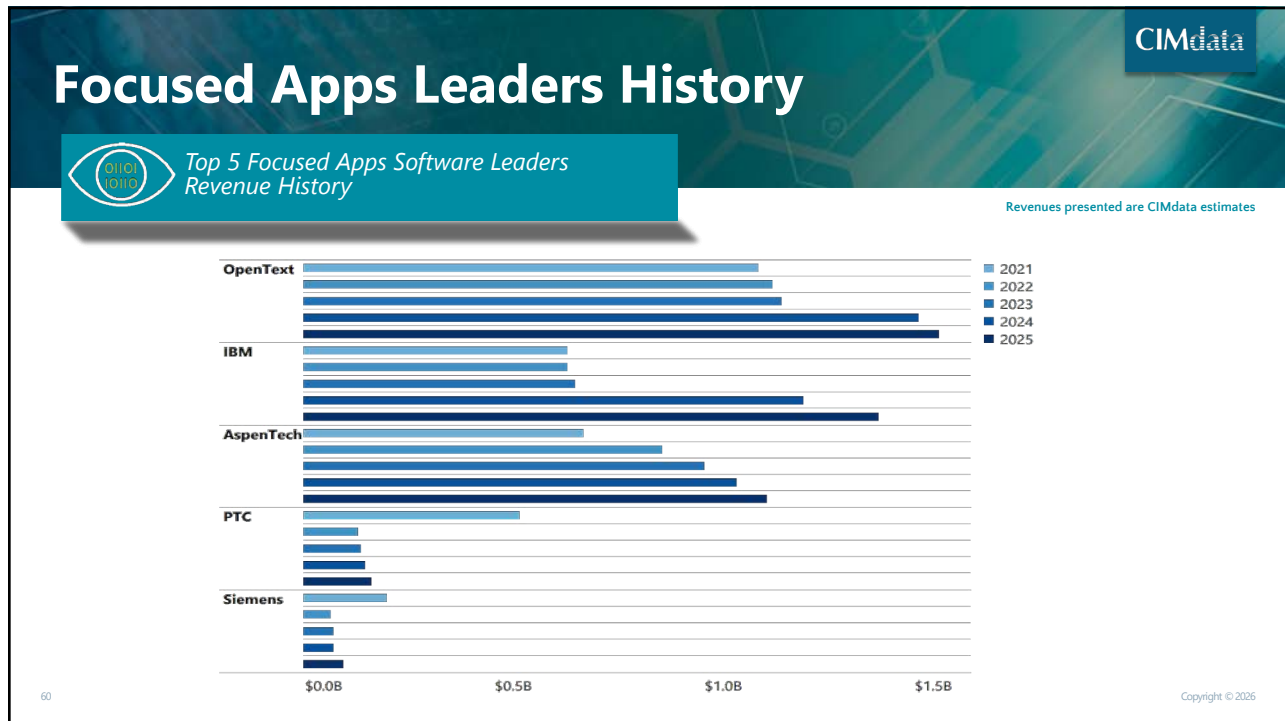
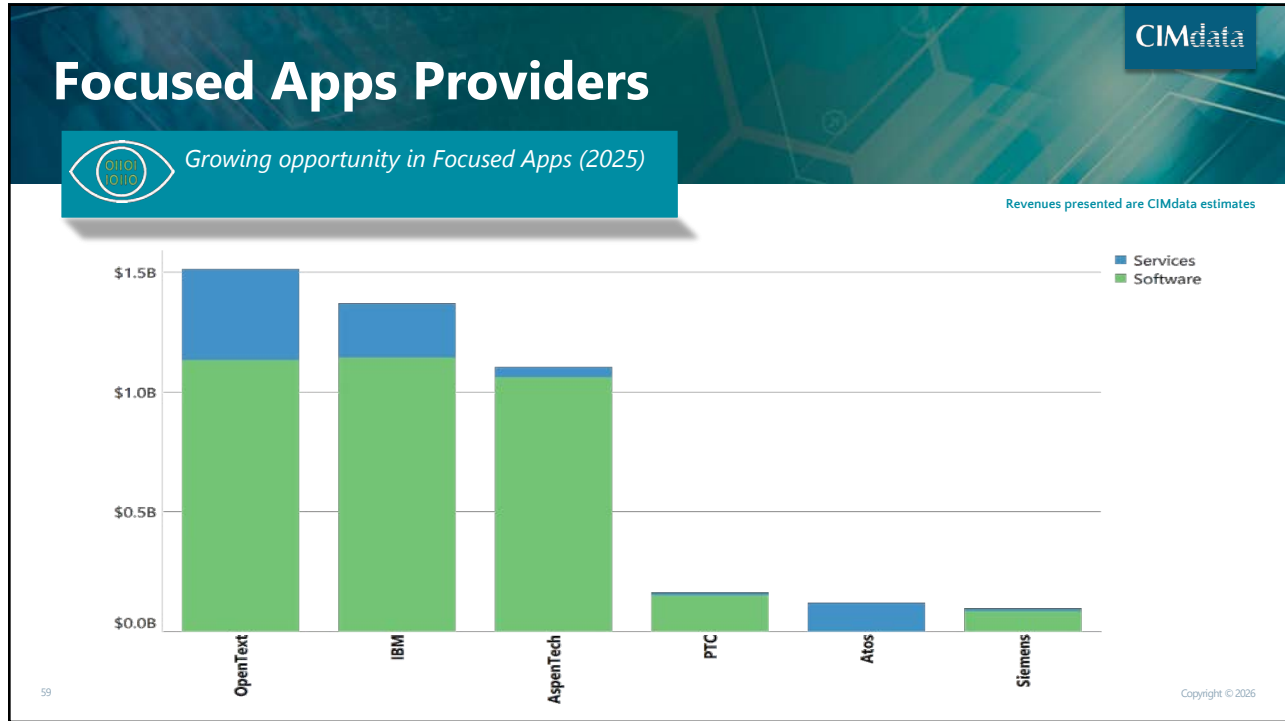
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### Agenda

- Updates at CIMdata
- Overall PLM Market Analysis
- PLM Mindshare Leaders
- Product Innovation Platforms Segment Market Analysis
- Tools Segment Market Analysis
- Concluding Remarks

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### Tool Segment Analysis



Review of Tool provider revenue performance

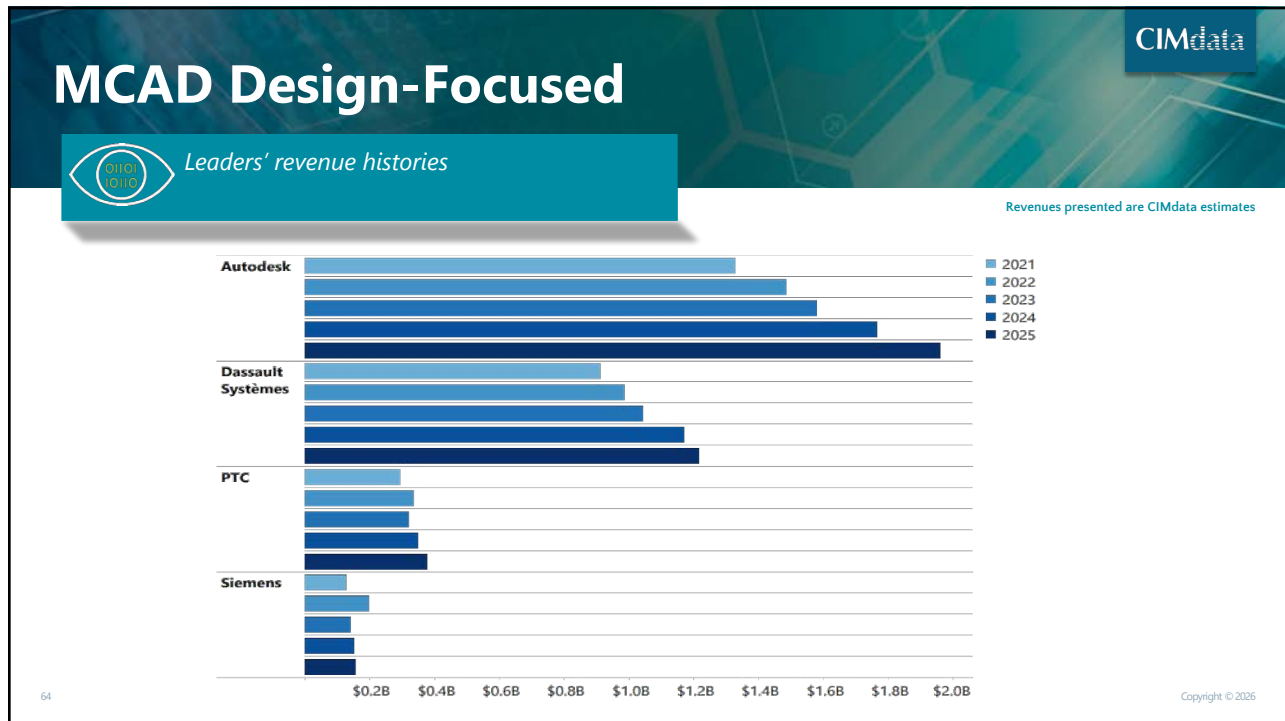
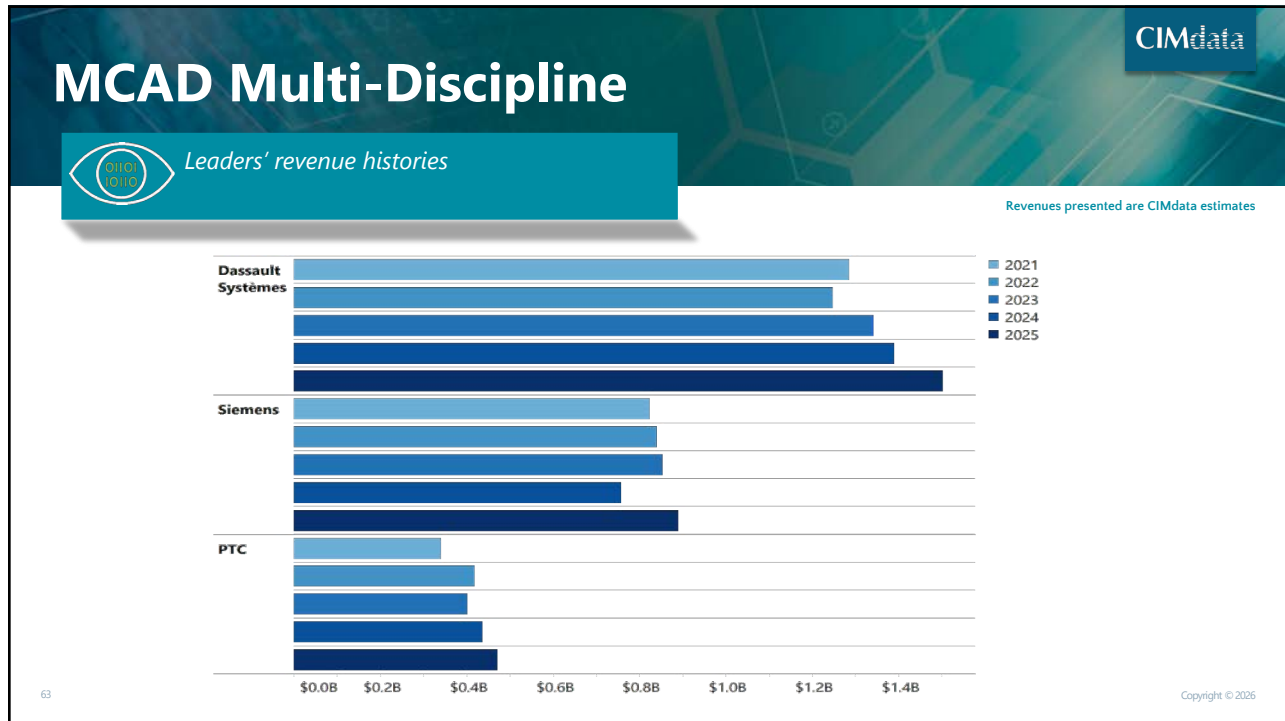
- MCAD-MD
  - Multi Disciplinary is increasingly cannibalized by design focused but still strong in certain industries
- MCAD-DF
  - The transition to subscription is increasing growth rapidly
- CAM
  - Holding steady
- S&A
  - Significant M&A activity in market leaders, trends driving growth will remain strong. Expect EDA+S&A products
- EDA
  - Strong year despite some challenges for major EDA solution providers
- AEC
  - Increasing digitalization continues strong demand and offering opportunities for startups

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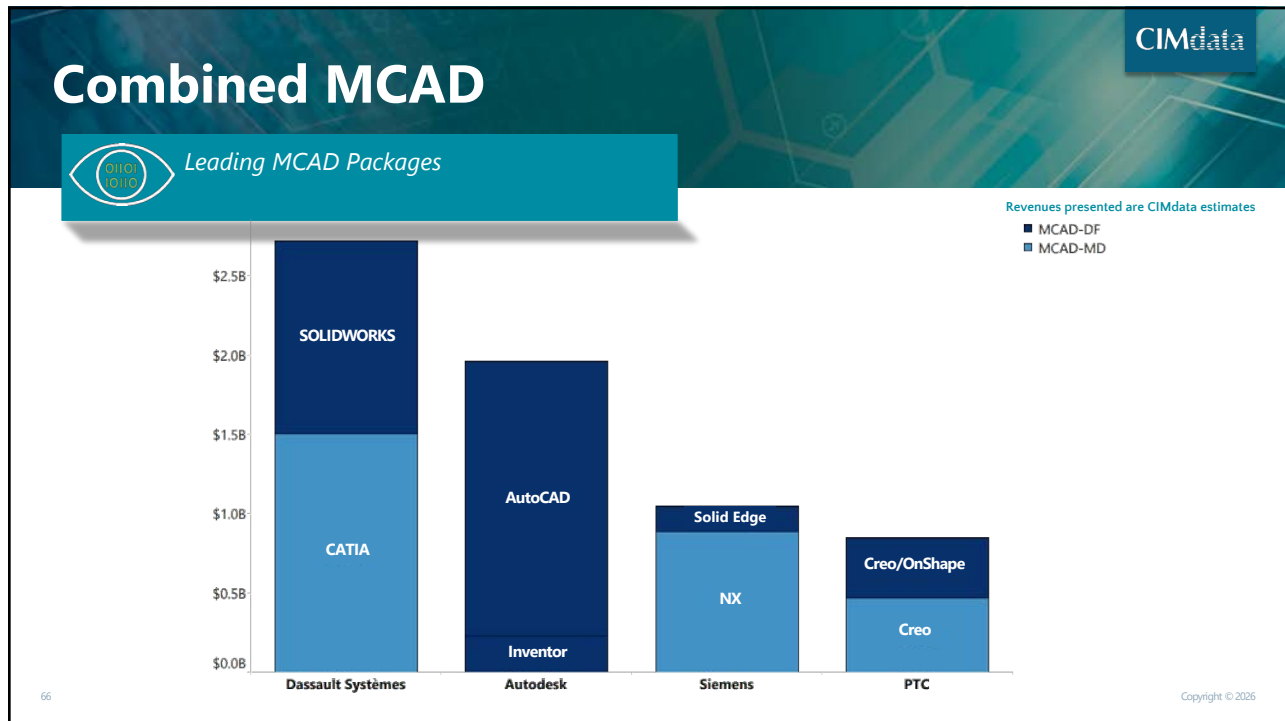
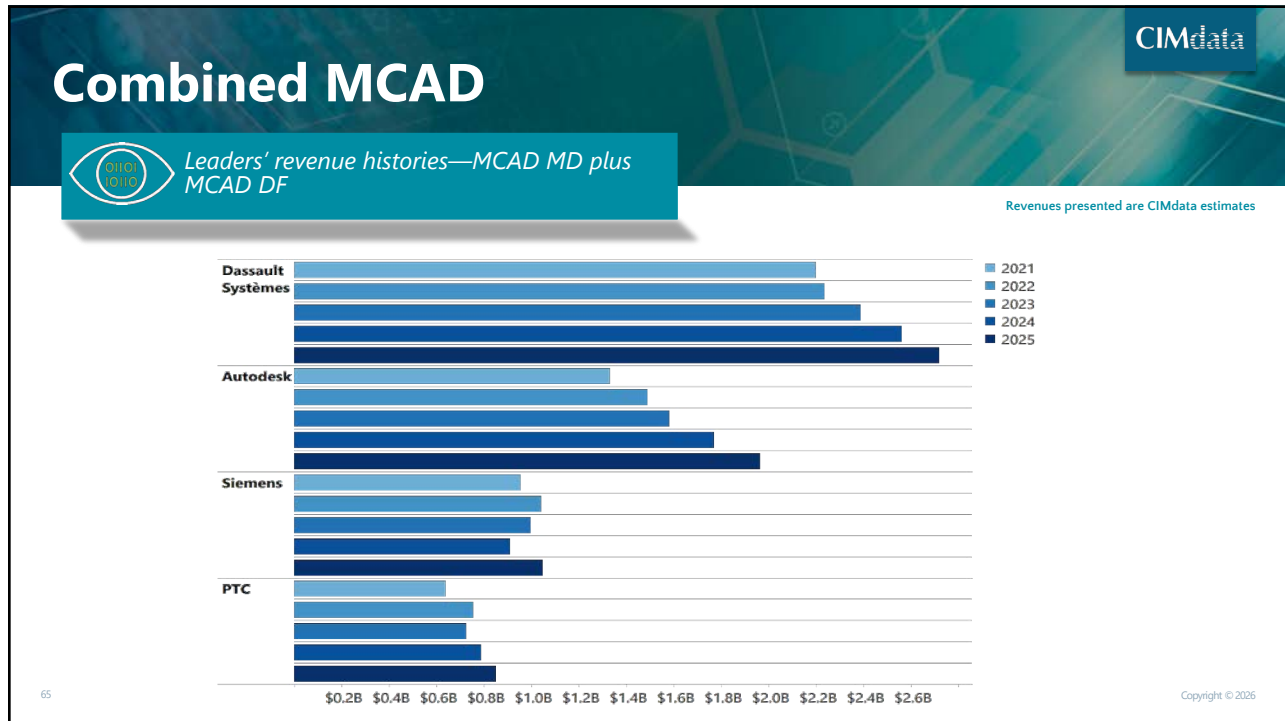
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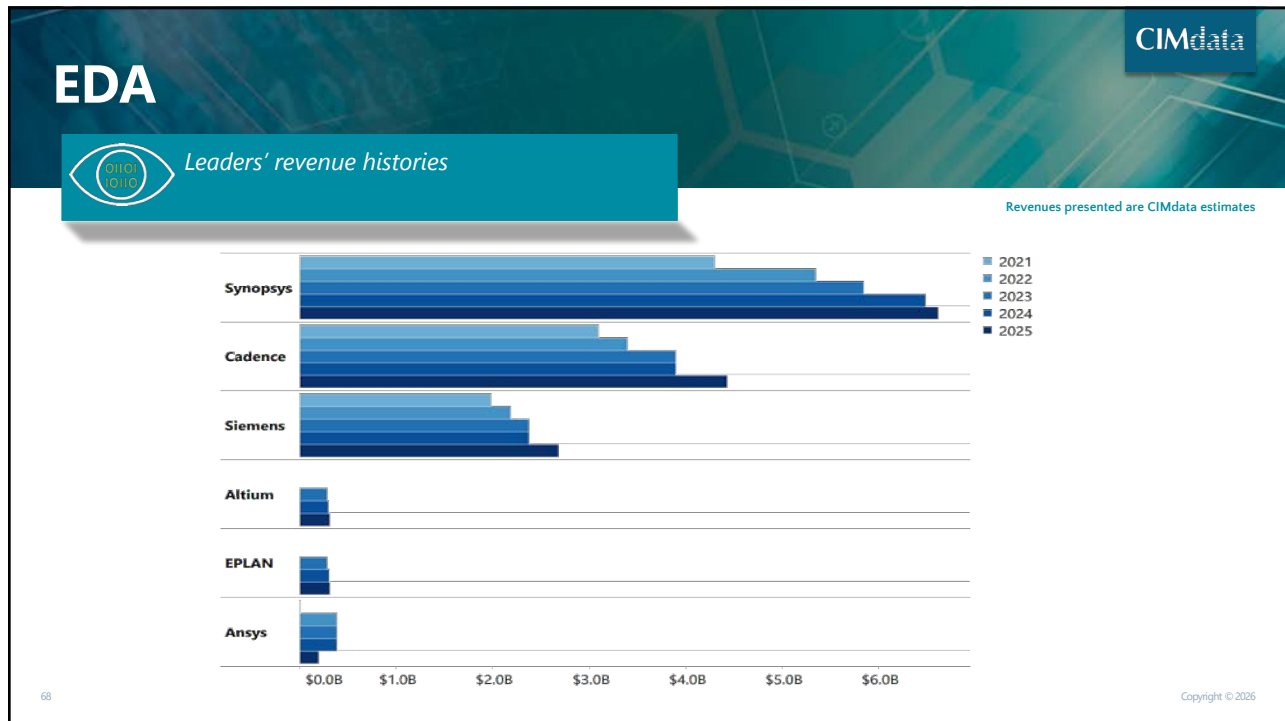
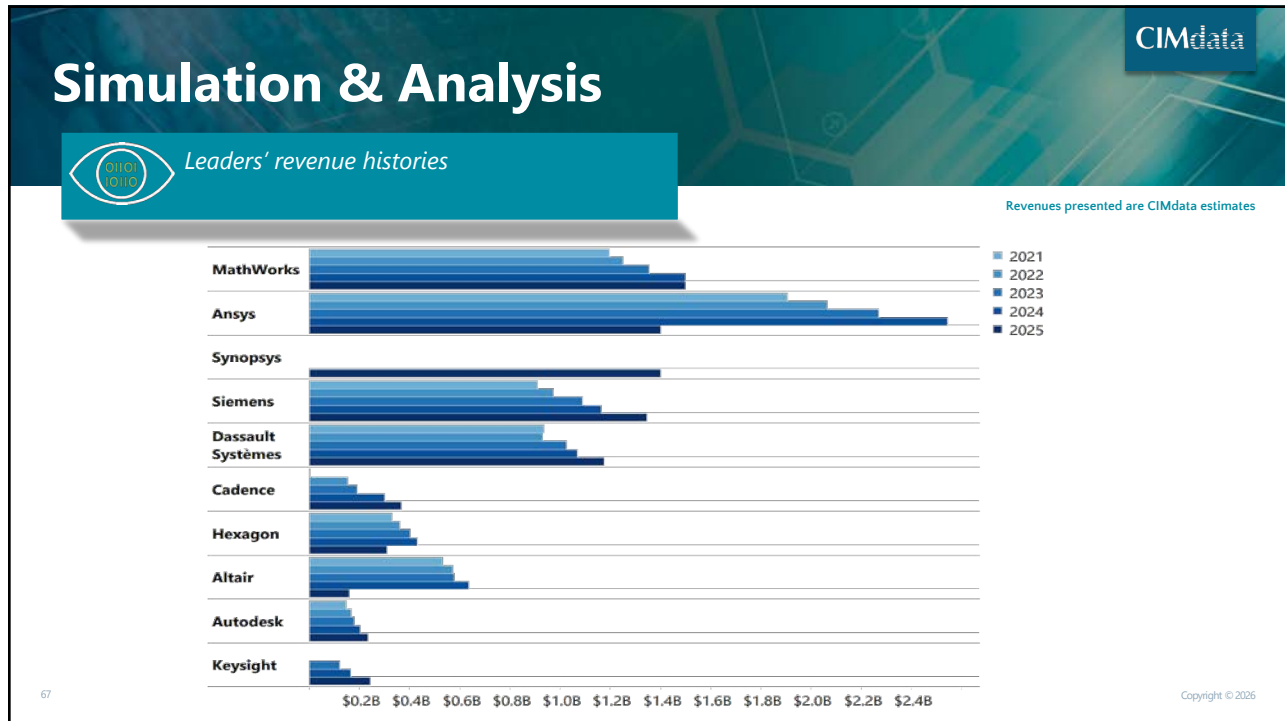
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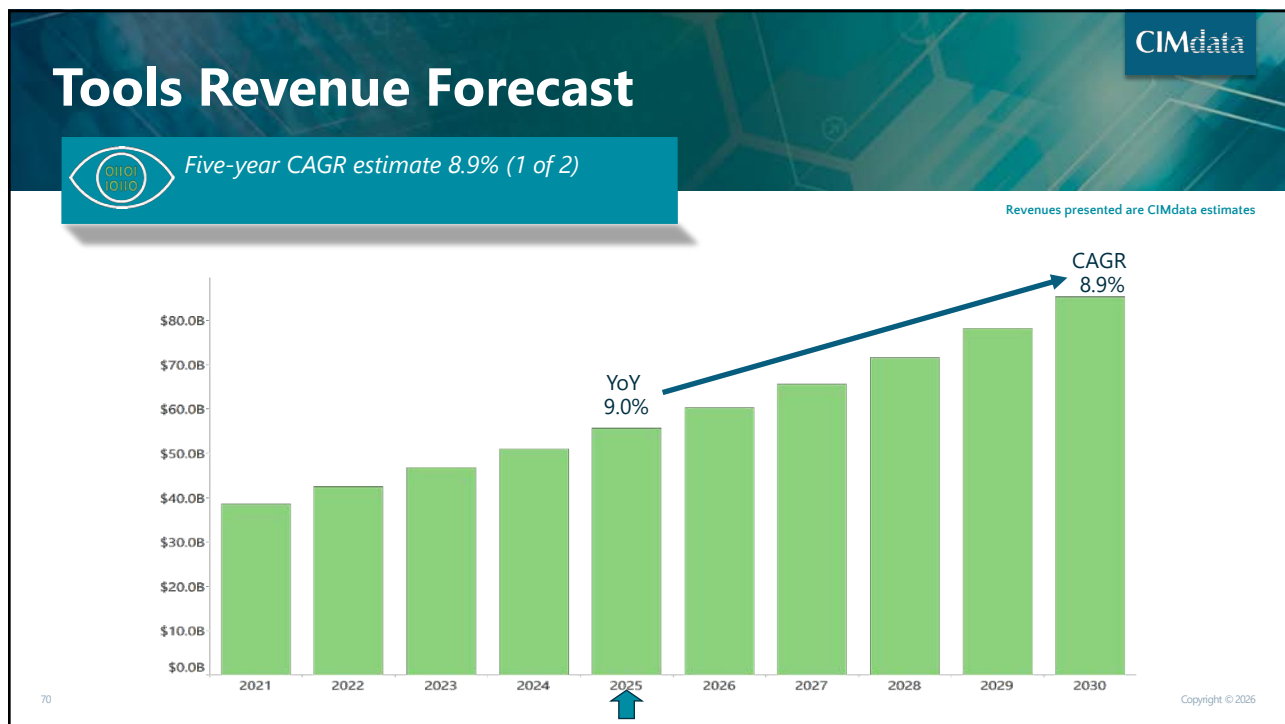
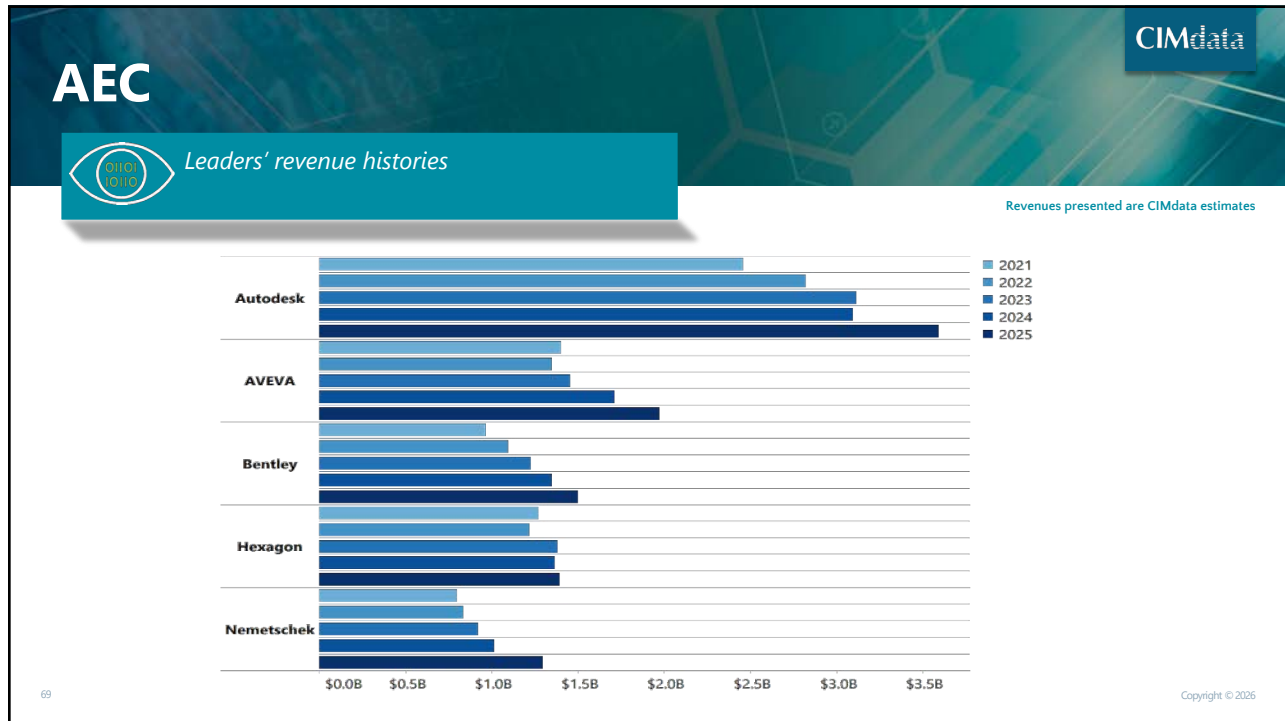
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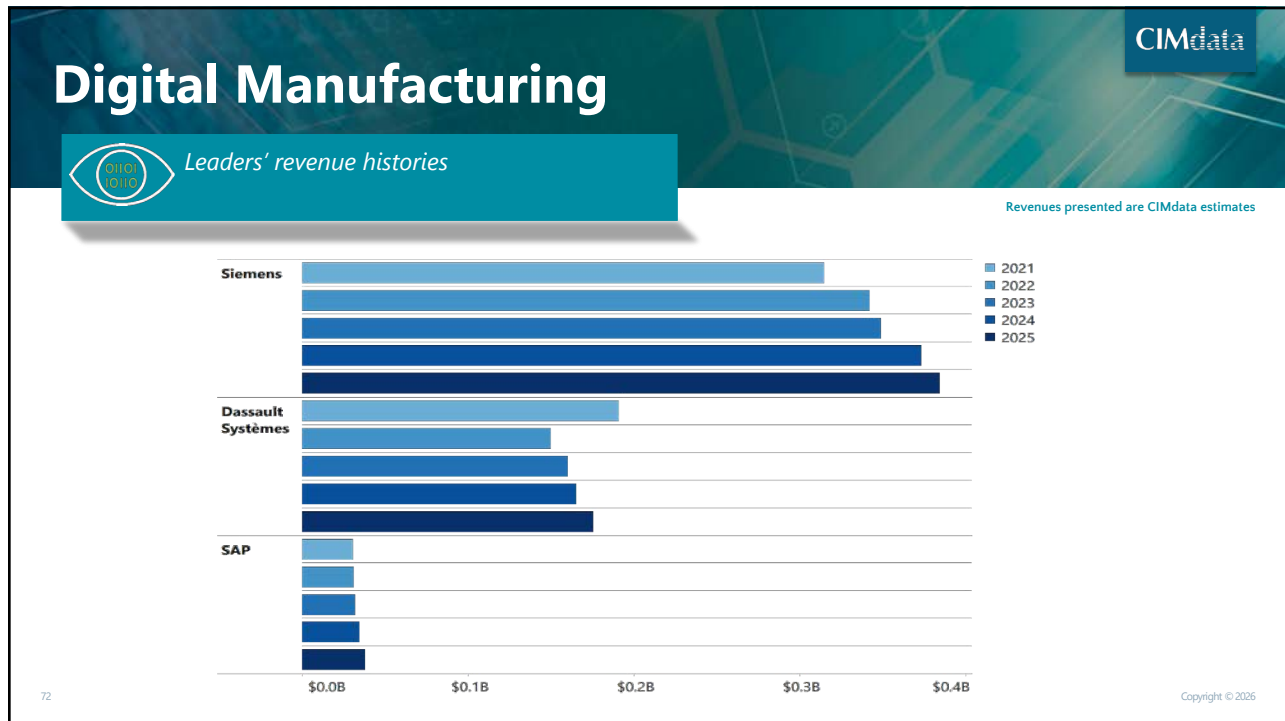
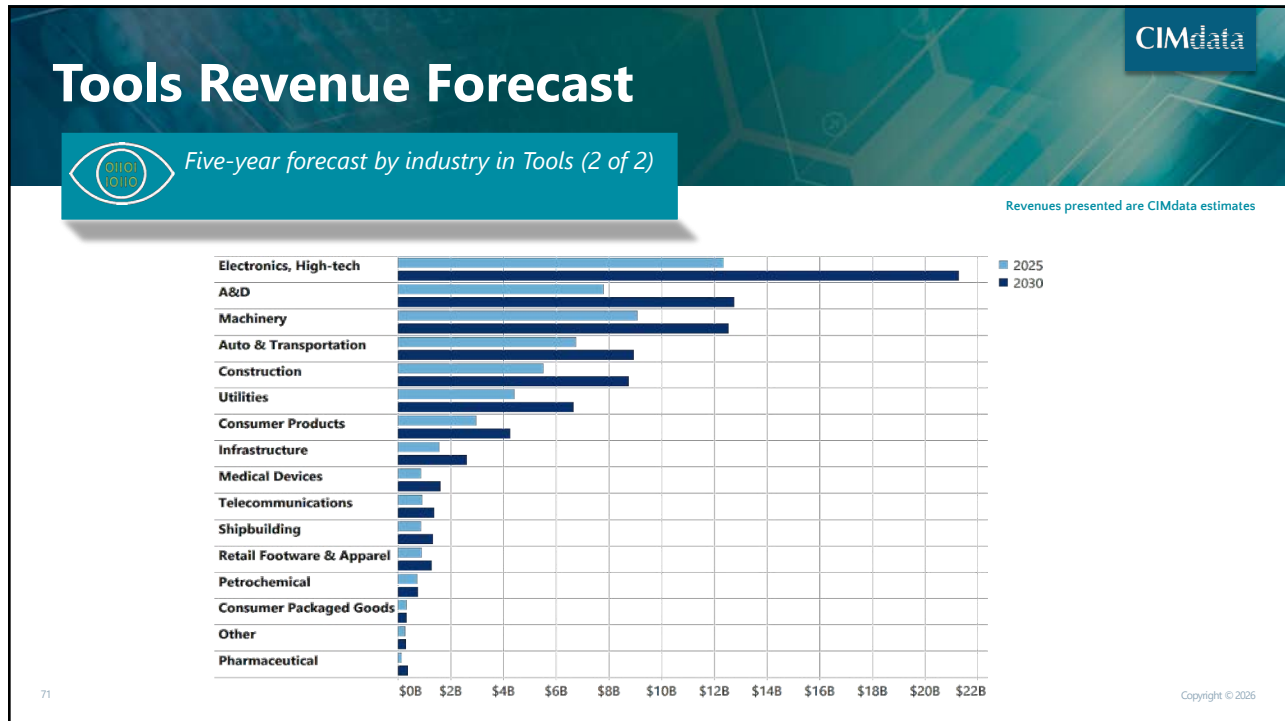
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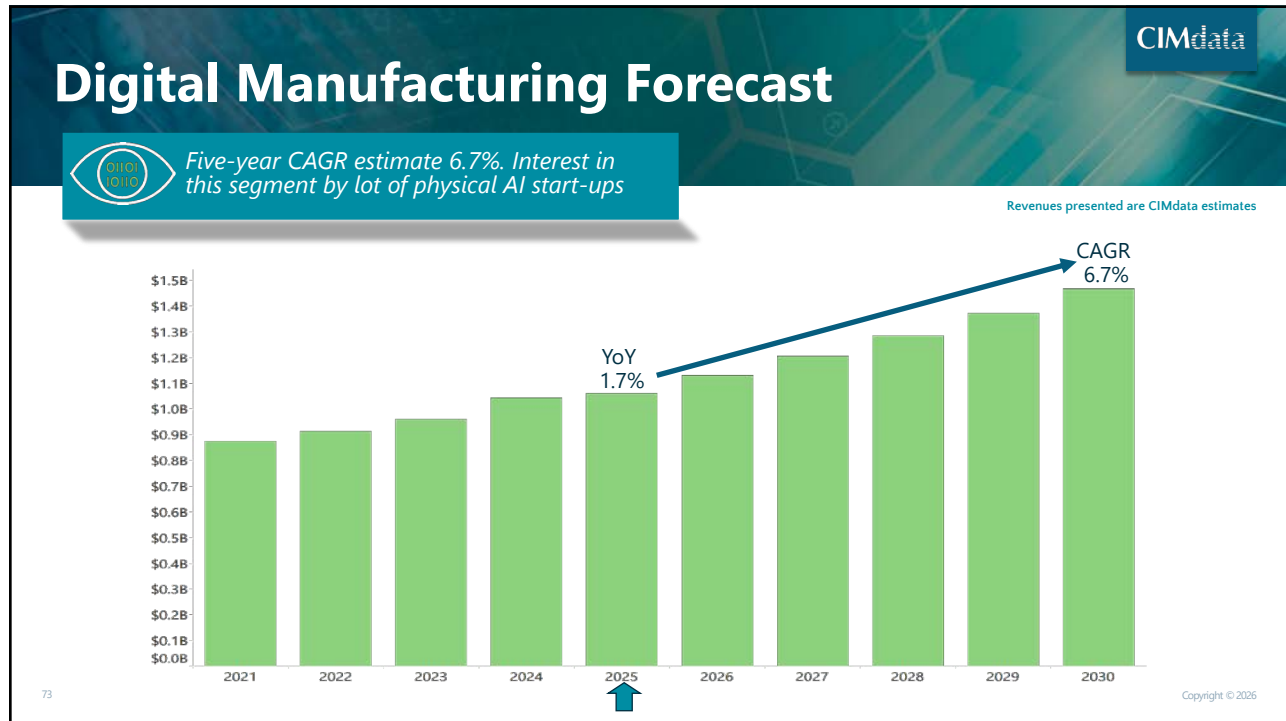
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# 2025 Market Analysis Results

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### Concluding Remarks



Factors impacting the global PLM Economy

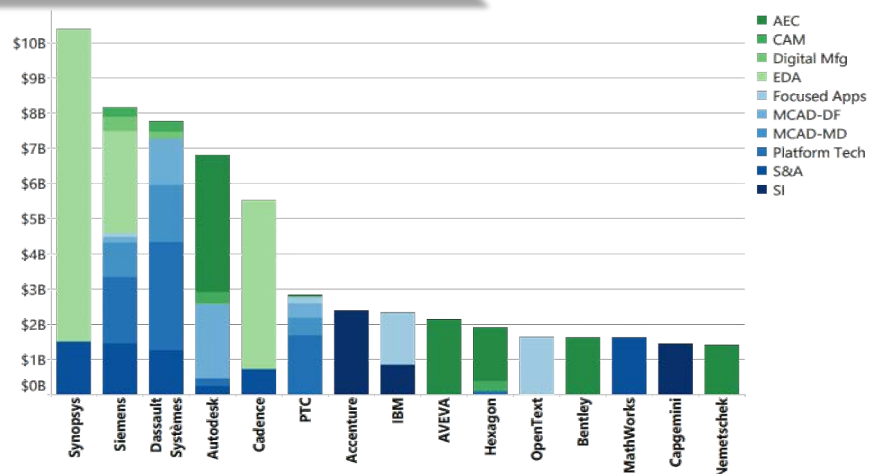
- 2025 revenue estimates were slightly below forecast
  - Likely due to environment of uncertainty
- AI is encouraging users to adopt platforms but are managements' convinced of ROI
- Software resellers feeling margin pressure, and are combining and shifting to becoming service providers
- EDA Acquisitions are most interesting
  - How will they bridge the gap with mechanical-engineering centric platforms?

### Leaders – The Changing Landscape in 2026



Estimated Landscapes for 2026—as of April 2026

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



*33<sup>rd</sup> 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 and comments on developing AI-simulation ecosystem



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### Questions & Answers

 What's on your mind?



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 Strategic management consulting for competitive advantage in global markets

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