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Magic Quadrant for API Management

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APIs provide the foundation for AI initiatives, headless architectures, modernization and digital product monetization. However, their widespread use introduces significant challenges. This Magic Quadrant assesses 17 API management vendors to help software engineering leaders select the most suitable ones.

Market Definition/Description

Gartner defines API management as the process of creating, securing, monitoring and maintaining application programming interfaces (APIs) in a controlled and scalable way. It ensures that APIs are usable, reliable and aligned with organizational policies and business goals.

APIs modernize IT architectures. They provide context, tools and resources to generative and agentic AI programs and provide access to systems, services, partners and data services. API management tools enable organizations to plan, deploy, secure, operate, version control and retire APIs, regardless of their size, region or industry.

Mandatory Features

- **API portal:** Provides a self-service developer portal for API consumers and developers to discover, try and register APIs to a centralized API catalog.
- **API gateway:** Provides, or integrates with, gateways for runtime management, security, policy enforcement, throttling, operational control and usage monitoring for APIs.

- **Policy management:** Provides the ability to create and use policies applied to API usage, including policies for API style enforcement, API mediation, logging, usage limits, throttling and security configurations. These policies may be enforced in gateways provided by the vendor or in third-party gateways
- **Governance:** Manages API versions, access control, publication and operation.
- **Life cycle management:** Versioning and retirement of APIs.

Optional Features

- **API design:** Capabilities to deliver a meaningful developer experience and tools to design APIs and enable API usage for existing systems.
- **API testing:** Provides a range of advanced testing capabilities, such as functional, performance and security testing of APIs.
- **Monitoring and analytics:** Ability to produce, collect and report operational metrics and meaningful statistics for API consumption.
- **Security:** Ability to protect APIs from malicious activity and integrate with existing security infrastructure, enforce identity and access management rules, and enforce design time and operational security.
- **AI gateway support:** Provides security, mediation and traffic management for AI access to enterprise data and resources.
- **AI protocol support:** Supports implementations of Model Context Protocol (MCP) and other emerging protocols, such as Agent2Agent (A2A).
- **AI-enabled productivity:** Aimed at improving developer experience, productivity and operational rigor (e.g., when generating API specifications, documenting APIs, obtaining usage analytics or optimizing traffic).
- **Gateway federation:** Ability to manage multiple instances and form factors of gateways, including third-party API gateways.
- **API and AI mediation:** Features to implement composite services, service mediation, and protocol mapping and translation.
- **Monetization:** Ability to implement pricing models, billing strategies and chargeback methods, as well as to commercialize and market API products.

Magic Quadrant

Figure 1: Magic Quadrant for API Management



Vendor Strengths and Cautions

Amazon Web Services

Amazon Web Services (AWS) is a Challenger in this Magic Quadrant. Its API management offering is Amazon API Gateway. AWS offers three options for Amazon API Gateway: REST APIs, which include capabilities to manage API keys, usage plans and web application firewall

(WAF) support; HTTP APIs, a lower-cost choice with fewer features; and WebSocket APIs for real-time, bidirectional communication. AWS' recent product focus has been to add management features that it has lacked, such as an API portal, to further enhance its security capabilities. Amazon API Gateway is available exclusively as a SaaS deployment.

AWS' operations are geographically distributed. Its clients include organizations of all sizes.

Strengths

- **Operations:** AWS reported processing more than 200 trillion API requests in 2025, a 33% increase that it attributes to greater API demand from AI-based applications. AWS is operating at a scale that dwarfs its competitors, claiming to have more than 470,000 active accounts, a 19% year-over-year increase.
- **Business model:** AWS has built an extensive network of partners, and its AWS Marketplace offers more than 20,000 solutions. This ecosystem provides customers with complementary API management capabilities in areas where API Gateway is lagging, such as API design, testing and portals.
- **Product strategy:** AWS' recent investments in API management capabilities, along with its product roadmap, improve its competitiveness with stand-alone API management solutions. These ongoing developments complement its continued focus on scale, security and integration with other AWS solutions.

Cautions

- **Market understanding:** AWS positions Amazon API Gateway as a complementary component of other AI-based applications like Amazon Bedrock AgentCore, while competitors are providing more AI-related capabilities, such as AI agent and MCP registries, directly within their API management offerings.
- **Market responsiveness:** AWS is continuing to catch up in terms of its API management capabilities. Amazon API Gateway only recently added features that its competitors added years earlier, such as an API portal and response streaming.
- **Innovation:** Amazon API Gateway, as an API management platform, is more narrowly scoped than many competitors and generally evolves more slowly, with less market leadership in vision and new capabilities. Buyers seeking leading-edge and comprehensive API design, testing, governance and integration capabilities should consider other solutions.

Axway

Axway is a Challenger in this Magic Quadrant. It offers the Amplify Platform, which includes Amplify API Gateway, Amplify Engage (a SaaS-native marketplace and federated API registry), Amplify Fusion (a low-code/no-code iPaaS built on the acquisition of DXchange.io), and Amplify AI Gateway. The platform provides API management capabilities such as gateway, portal, builder and lightweight agents for API discovery, subscription management, traceability and analytics across multivendor and third-party runtimes. Axway supports deployments on-premises, in private and public cloud, and in hybrid and SaaS environments.

Axway primarily operates in Europe and the Americas. Its clients are mainly midsize and large enterprises.

Strengths

- **Product:** Axway provides strong deployment flexibility, offering identical runtimes across on-premises, private cloud, public cloud and hybrid environments. The platform enables seamless migration by exporting configurations, and it supports fully air-gapped, sovereign Kubernetes deployments for strict regulatory requirements.
- **Product strategy:** Axway enables multigateway federation through Amplify Engage, allowing for centralized governance and cataloging of APIs across more than 25 third-party gateways. The platform uses lightweight, out-of-path agents for discovery and policy enforcement, promoting consistent security and subscription management without requiring rip-and-replace migrations or vendor lock-in.
- **Operations:** Axway delivers multilanguage support, a globally distributed 24/7 support system with rapid SLA commitments, and extensive security and compliance certifications. Its resilient architecture enables zero-downtime operations and efficient scaling for high-volume traffic, supporting global enterprise needs.

Cautions

- **Innovation:** While Axway is extending its API and integration platform to cover AI and agentic use cases, its roadmap remains more incremental than transformative compared with other market leaders. Prospective customers should confirm whether Axway's roadmap and delivery trajectory align with their API, integration and AI governance priorities.

- **Marketing strategy:** Axway's go-to-market approach does not effectively target the shifting buying center, lacking clear messaging for AI engineers and developers. Its passive market posture and reliance on complexity-driven adoption have led to low presence in competitive evaluations, few client inquiries and limited awareness of its portfolio — even among existing customers.

- **Sales strategy:** Axway's revenue performance in the API management segment continues to be below the market average, and it has added fewer paid customers than leading competitors. Limited cross-sell conversion and sales pull-through from its parent company may further constrain growth.

Boomi

Boomi is a Leader in this Magic Quadrant. It offers Boomi API Management as part of the Boomi Enterprise Platform, which includes iPaaS, Agent Control Plane, data integration, workflow, data catalog, event streams, managed file transfer and low-code development. The platform supports both Boomi and third-party gateways, and it is delivered as a multitenant SaaS with a dedicated European instance for GDPR and data sovereignty. Runtime options include SaaS, dedicated cloud, on-premises, Kubernetes and hybrid environments.

Boomi's operations are geographically distributed, and its clients are mostly large and midsize organizations.

Strengths

- **Product strategy:** Boomi demonstrates a clear understanding of enterprise needs by unifying API, integration and AI management within a single platform. The company has effectively integrated strategic acquisitions — including APIIDA, TIBCO Mashery and Thru — to enhance federated API management and integration capabilities. The recent acquisition of Lunar.dev, focused on API consumption management with agentic AI governance, rate limiting and dynamic, cost-controlled routing to scale AI traffic, further signals Boomi's intent to expand in these emerging areas.

- **Innovation:** Boomi continues to advance its AI and agentic capabilities, highlighted by the introduction of features such as Boomi Connect and Boomi Orchestrate. Its agent-to-deterministic conversion provides a practical approach to connect probabilistic AI workflows with secure, rule-based API management.

- **Business model:** Boomi has expanded across North America, Europe, and Asia/Pacific, strengthened its partnerships with ServiceNow, Snowflake and AWS, and extended its sales focus to integration buyers and AI specialists. All these actions have boosted Boomi's visibility and attracted a wider customer base.

Cautions

- **Customer experience:** Boomi customers on Gartner Peer Insights report a steep learning curve, platform complexity and concerns about pricing transparency. Some face challenges integrating with third-party gateways, particularly for complex or nonstandard API management scenarios. Gartner has also observed discontent among Boomi customers due to pricing model changes.
- **Vertical/industry strategy:** Boomi's industry-agnostic approach limits its appeal for organizations needing deep, industry-specific solutions. While it offers security certifications and accelerators for industries like healthcare and retail, the platform may not meet all specialized requirements.
- **Geographic strategy:** Boomi remains underrepresented in Latin America and is not a revenue leader outside North America. Although the company has increased its investments in regions like Europe, Boomi's presence and brand awareness outside North America still lag behind its domestic footprint.

Google

Google is a Leader in this Magic Quadrant. It offers Apigee API Management, Apigee Advanced API Security, and Google Cloud API Gateway, which are SaaS products that are part of Google Cloud. It also offers Apigee Hybrid, which supports on-premises and privately hosted runtimes, and Google Cloud Endpoints, a customer-managed service separate from Apigee, to run colocated gateways or private networking. Google also offers Apigee for Private Cloud to support air-gapped and sovereign environments; Apigee API hub as a federated API catalog and control plane; and Agent Gateway to manage and control agents running on Google Cloud.

Google's operations are geographically distributed. Its clients include organizations of all sizes.

Strengths

- **Innovation:** Google has been at the forefront of delivering AI gateways and agentic capabilities, positioning Apigee as a leading platform for AI-ready API management. Apigee integrates with Google Cloud innovations such as the Agent2Agent (A2A) protocol for secure multiagent communication, Gemini Enterprise, and specification boost for automated legacy API conversion. It also includes a three-layer AI security stack to provide real-time protection and governance for API and MCP deployments.
- **Product strategy:** Google's platform continues to provide strong multilayer security and AI features that support hard-to-manage environments, such as banks and large-scale manufacturing companies.
- **Overall viability:** Google Cloud's Apigee and API Gateway are widely used in regulated industries such as banking and telecommunications. Apigee benefits from Google's global infrastructure, strong compliance credentials, ongoing R&D investment and enterprise-grade support.

Cautions

- **Sales strategy:** Google continues to position its API management offering as a component of Google Cloud. Some features are only available on Google Cloud, but Apigee Hybrid supports customers who are committed to other cloud providers or who want API management deployed independently of Google Cloud.
- **Market understanding:** Apigee is still a relatively complex product that is primarily designed for the strategic API management requirements of larger enterprises. Buyers need deep expertise to implement and use Apigee, which can hamper adoption. Google Cloud is making efforts to appeal to developers as influencers on buying decisions, with an onboarding experience aimed at improving time to value.
- **Pricing:** Gartner clients still report that the expense of running Apigee is one of the largest barriers to continuing product use. Google Cloud offers pay-as-you-go and tiered subscription options but cost management requires active oversight as API call volumes and environment complexity grow.

Gravitee

Gravitee is a Leader in this Magic Quadrant. It offers Gravitee, a platform that includes API Management, Agent Management, Event Management, Authorization Management, and Identity & Access Management. Gravitee's recent product focus has been to improve support

for managing AI agents and MCP servers, such as through its unified Gamma Platform. Its solution is available in self-hosted, SaaS or hybrid deployment models.

Gravitee's operations are primarily in Europe and North America, and its clients are organizations of all sizes.

Strengths

- **Market understanding:** Gravitee was early in its vision for a unified catalog of interfaces, including multiple API protocols, first-class treatment of events, and then MCP servers and AI agents, simplifying discovery, monitoring and policy enforcement.
- **Product strategy:** Gravitee allows customers to avoid dependence on a specific cloud platform, enterprise application or iPaaS vendor. The platform supports multiple deployment models, gateway federation, and design and testing capabilities, offering flexibility for unified API management. In June 2026, Gravitee released Gravitee Gamma, combining API gateway, MCP gateway, AI gateway and event management in one platform. This release also added Agent Management and Authorization Management to address integration and security needs.
- **Innovation:** Gravitee has pioneered a shift from API-first to agent-first architectures with its Gamma platform, offering native triple-proxy capabilities for LLM, MCP tool-calling, and A2A traffic. Gravitee treats AI agents as cataloged components rather than just API consumers, enabling greater consistency. The platform features ReBAC authorization, SPIFFE/SPIRE agent identities, and an edge-device daemon for managing shadow AI traffic.

Cautions

- **Marketing execution:** Gravitee has increased its visibility via advertising and events, but its comparative lack of brand awareness, especially in North America, makes it less likely than other Leaders to be evaluated by potential customers.
- **Geographic strategy:** Nearly two-thirds of Gravitee customers are in Europe, with the remaining third in North America. Buyers outside of these regions should ask Gravitee about the level of service and support available in their region.
- **Overall viability:** Gravitee is one of the smallest vendors by revenue in the Magic Quadrant, and several of its competitors are among the largest software companies in the world. As a result, customers should consider the risk that Gravitee gets acquired by a competitor.

IBM

IBM is a Leader in this Magic Quadrant. It offers IBM API Connect, which enables clients to create, manage, secure and share their APIs. IBM API Connect includes API Gateway, API Manager, API Testing, Developer Portal and AI Gateway. IBM API Connect is part of IBM's broader middleware portfolio, which includes IBM App Connect, Event Streams and IBM Integration Software. IBM's recent focus has been on its IBM DataPower Nano Gateway and support for AI agents and MCP servers. IBM API Connect is available as SaaS, as a customer- or IBM-managed deployment in a hybrid environment, and as a part of IBM Cloud Pak for Integration.

IBM's operations are geographically diversified, and its customers tend to be midsize and large organizations.

Strengths

- **Product strategy:** IBM API Connect is a well-balanced technical product. IBM continues to invest in an aggressive product roadmap, particularly to support emerging application patterns of integrating AI agents and APIs.
- **Market understanding:** IBM demonstrates strong market understanding of AI-driven API management, including challenges like API sprawl, API consumption by AI, governance and fragmented environments. Its API Connect platform addresses these with features such as automated API rationalization, an MCP server enhancer for metadata enrichment, developer-native MCP integration, and natural-language policy authoring.
- **Business model:** IBM has expanded its reach and supported customer success through its partnerships, such as with system integrators, and by offering API Connect through hyperscaler marketplaces.

Cautions

- **Marketing execution:** API Connect mostly appeals to IBM's existing customers, despite IBM's size, high corporate brand recognition and the technical leadership of its offering. This suggests a challenge in reaching non-IBM enterprise buyers.
- **Sales strategy:** IBM's approach of targeting enterprise IT buyers will challenge its ability to reach new buyers and grow existing customer accounts, as development budgets are becoming decentralized and driven by AI investments.

- **Vertical/industry strategy**: Apart from banking and financial offerings, IBM API Connect provides few options that are tailored to specific industries. IBM has begun to address this by adding support for FedRAMP to appeal to U.S. government customers.

Kong

Kong is a Leader in this Magic Quadrant. Its API management offering includes Kong Konnect (SaaS) and Kong Enterprise for self-managed deployments, aimed at providing a unified connectivity layer for AI. Core components include Kong Gateway — a commercial version of its open-source API gateway — and Kong Insomnia, now enhanced with AI-assisted generation and local MCP client capabilities. Kong supports diverse deployment options, such as on-premises, vendor-managed cloud through its Dedicated Cloud Gateways, and service mesh deployments via Kong Mesh.

Kong's operations are primarily in North America and Europe. Its clients tend to be midsize and large organizations.

Strengths

- **Market understanding:** Kong demonstrates strong understanding of the shift from traditional API management to AI connectivity. The company's vision includes governing the full AI data path, with initiatives such as Context Mesh for agent context mediation, integrated machine-to-machine identity management, and capabilities for packaging and monetizing APIs, event streams, agents, LLMs and MCP servers.

- **Product strategy:** Kong's product roadmap effectively addresses agentic and AI-driven requirements, with features including code-mode MCP servers for dynamic code execution in secure environments. Kong's platform provides support for reactive agents that respond to real-time event streams, and it integrated the Kong-acquired OpenMeter for metering and billing of LLM tokens, events and API calls.

- **Marketing strategy:** Kong uses both enterprise sales and product-led adoption to reach new customers, supported by its large user base for open-source tools such as Kong Insomnia. The company's messaging focuses on AI and agentic use cases and is directed at technical and executive audiences.

Cautions

- **Vertical/industry strategy:** Kong does not offer vertical-focused features or tailored solutions for specific industries. Its approach is primarily horizontal, with most customers

coming from financial services and general technology sectors.

- Geographic strategy: Kong's market presence is heavily concentrated, with 40% of its revenue coming from the U.S. and 35% from EMEA. The company has a limited footprint in other regions, with only modest subsidiaries outside these core markets and no significant presence in Latin America. This limited geographic reach may impact its ability to serve global enterprises or expand into high-growth markets.
- Customer experience: In Gartner Peer Insights, some users have stated that Kong's platform is complex and has a notable learning curve. Some users also cited confusion regarding the fragmented, service-based pricing model, especially with separate charges for features such as plugins, developer portals, analytics and testing tools. The platform also lacks robust support for third-party gateway federation.

Microsoft

Microsoft is a Challenger in this Magic Quadrant. It offers Azure API Management (APIM), a runtime gateway layer for securely publishing, routing, observing and monitoring both APIs and API endpoints; and Azure API Center, a unified catalog of APIs, AI Models, MCP servers, tools and AI agents. Microsoft supports multiple deployment models, including hybrid and a self-hosted gateway with limited support for air-gapped situations.

Microsoft also offers separate products that are part of its overall API management solution. These include Defender for APIs, an AI-powered security tool integrated with Microsoft Defender for Cloud; Entra ID for identity, authentication and role-based access controls; and Azure Monitor and Application Insights for telemetry, observability and dashboards. The solution also includes Microsoft and GitHub Copilot to assist developers by generating API specs from natural language, drafting policies and executing test cases.

Microsoft's operations are geographically distributed. Its clients include organizations of all sizes.

Strengths

- Operations: Microsoft reports that Azure APIM processes 3.92 trillion API calls per month (doubling over the past year) and 8 billion AI gateway requests per month, making it the second-largest gateway in terms of volume. It claims a 99.99% uptime, and it provides 100 compliance certifications and native integrations with other Azure services, like Defender for APIs, Entra ID and Purview to provide governance, compliance and threat protection.

- **Pricing:** Microsoft introduced a free tier for the basic v2 level of its AI gateway, which allows customers to experiment before paying. Azure API Center is also included in most pricing plans, and it offers a Premium v2 tier that eliminates overage charges.
- **Innovation:** Microsoft has continued to add AI capabilities into its portfolio, providing governed access to more than 11,000 AI models with token management, semantic caching, context guardrails and cost controls through Azure APIM. It also provides deep integration with Microsoft Foundry to provide an integrated developer experience.

Cautions

- **Product:** Azure APIM is highly connected with other Azure services, such as Entra ID, and customers need to commit to the Azure ecosystem to get a complete API management solution. Azure APIM is not well-suited to multicloud enterprises.
- **Marketing strategy:** Microsoft's marketing focuses on its larger Azure and Foundry value story, with little emphasis placed on Azure APIM's capabilities. This broad focus has little appeal to buyers seeking stand-alone API management solutions, especially those in multicloud enterprises or in organizations with non-Azure-centric ecosystems.
- **Deployment flexibility:** Microsoft's central control plane forces on-premises deployments to call home to synchronize policies and configurations. Air-gapped deployments are supported, but must still rely on Microsoft-managed data centers, rather than running in a customer's own disconnected infrastructure.

Postman

Postman is a Visionary in this Magic Quadrant. It offers the Postman API Platform, a SaaS-only offering that features capabilities such as API design and cataloging, AI assistants, Flows, and both Public and Private API Networks. Postman also introduced Fabric Gateway, a stateless, no-code MCP generator based on an open-source project called reShapr. Postman still does not deliver its own API gateway, but it supports publishing API definitions through CI/CD pipelines to multiple third-party gateways. It provides automated discovery and cataloging across the supported gateways. Postman continues to focus on the developer experience and now agents, with developers as the core buyer.

Postman operates primarily in the U.S., EMEA and Asia/Pacific, serving organizations of all sizes.

Strengths

- **Innovation:** Postman released a new platform in 2026 focused on Git-native development, which allows APIs to be stored and versioned in the same way as other developer artifacts. It also introduced a new collections format that stores collections as human-readable and diffable files, so developers can work on the same branches as their code, work offline, and use a code editor and terminal inside Postman.
- **Marketing strategy:** Postman effectively tailors its messaging to several different buyer personas. It emphasizes strong developer adoption, strong governance and the ability for product managers to define and deliver API products from within the same product. Another key focus area of Postman's messaging is its Run in Postman feature, which allows customers to call their first API in less than a minute.
- **Business model:** Postman has shifted to a sales-led growth strategy by charging for any collaboration on APIs. Its use of marketplaces simplifies purchasing and integration with partner solutions, while sharing and collaboration features support cross-team work. The Fern acquisition enhances documentation and SDK delivery, improving onboarding and development efficiency.

Cautions

- **Product:** Postman is introducing its own gateway known as Fabric, but this was in preview at the time of writing this research. Until generally available, customers must still rely on independently sourced third-party gateways and vendors for runtime execution and operational API management features.
- **Product strategy:** Postman's platform remains available exclusively as a SaaS offering hosted on AWS. Postman reports that a private cloud is on its roadmap. Customers needing hybrid, on-premises or alternative cloud deployments must continue to look for alternatives.
- **Pricing:** Some customers report frustration with Postman's pricing changes. Additionally, Postman removed team collaboration capabilities from its free plan in 2026 in an effort to get more people to pay for its commercial license.

Salesforce (MuleSoft)

Salesforce (MuleSoft) is a Leader in this Magic Quadrant. Its API management offering serves as a unified control plane for both APIs and AI agents. The platform includes Anypoint API Manager, Anypoint API Designer, Anypoint API Governance, Agent Fabric and the Envoy-

based MuleSoft Omni Gateway (rebranded from Flex Gateway in May 2026). It also features Anypoint Exchange, which serves as a hub for sharing APIs, LLM configurations, and MCP servers; and Anypoint API Experience Hub, which provides tools for building customized developer portals. The platform supports on-premises, cloud and hybrid deployments.

MuleSoft is fully integrated under Salesforce, with a global customer base spanning midsize and large enterprises.

Strengths

- **Product strategy:** MuleSoft's Anypoint Platform unifies API management with AI and agent governance, providing a single control plane for integration and automation. Recent enhancements, including features for natural-language API development and tools for converting REST APIs into governed agent tools, support both established integration needs and new agentic use cases.
- **Market understanding:** MuleSoft addresses complex challenges such as shadow AI, MCP sprawl, secure model failures and token cost management, positioning itself as a provider that anticipates and responds to the needs of organizations adopting AI and agent-based architectures.
- **Overall viability:** MuleSoft is fully integrated within Salesforce, benefiting from the resources and reach of its parent company. The platform continues to expand its customer base across enterprise and midmarket segments, demonstrating sustained growth and operational stability in the API management market.

Cautions

- **Pricing:** MuleSoft is frequently cited as one of the most expensive API management platforms. Customers report that its licensing and pricing structures are complex, citing concerns about unexpected overage charges and escalating costs. The new Mule Credits model was recently introduced to simplify pricing and to address cost-related issues.
- **Business model:** MuleSoft's tight integration with the Salesforce ecosystem can be beneficial for organizations that are already Salesforce customers. However, this alignment can be perceived as overkill for independent developers or organizations outside the Salesforce environment, as many features are designed to support Salesforce-specific priorities and use cases.

- **Customer experience:** MuleSoft's platform is highly sophisticated, resulting in a steep learning curve and setup challenges. Buyers face difficulties finding and retaining developers with specialized MuleSoft skills, which can create operational bottlenecks and lead some customers to consider alternative integration platforms.

SAP

SAP is a Challenger in this Magic Quadrant. It offers API Management as a capability of SAP Integration Suite, part of the SAP Business AI Platform. API Management includes an API gateway, a developer hub for APIs, and API Composition. In 2026, SAP introduced the Integration Cell capability — a lightweight, Kubernetes-based gateway runtime available as a cloud SaaS service and complementary with Edge Integration Cell for hybrid or private cloud deployments. SAP Integration Suite is a managed multicloud environment that can be hosted by Alibaba Cloud, AWS, GCP, Microsoft Azure or SAP. SAP also supports hybrid deployments of API gateways at the edge of on-premises networks and in private clouds, governed by a unified cloud-based control plane.

SAP's operations are geographically distributed, with primarily midsize and large organizations.

Strengths

- **Geographic strategy:** SAP operates in more than 180 countries and collaborates with a very large partner ecosystem. Its platform supports regional compliance and sovereignty requirements through regional deployments and prebuilt compliance modules for specific regulatory environments.
- **Overall viability:** SAP's financial stability and large customer base — over 16,000 organizations using SAP Integration Suite — ensure ongoing investment in API management. This stability enables SAP to enhance its API capabilities and align them with its broader Business Technology Platform, offering customers a reliable, enterprise-grade solution for mission-critical integrations.
- **Operations:** SAP offers flexible deployment options across major cloud providers, private clouds and on-premises environments. Edge Integration Cell supports hybrid and edge deployments managed through a unified control plane, and the platform provides high availability and operational support globally.

Cautions

- **Sales strategy:** SAP's API Management primarily appeals to existing SAP customers whose APIs are on the SAP platform, with limited adoption among stand-alone organizations, independent AI engineers or agentic developers. This limited appeal narrows SAP's relevance in the broader API management and AI integration markets.
- **Product:** SAP relies on OEM agreements, such as with Google Cloud's Apigee gateway and Solace's messaging and event brokers for core components, which limits its control over the product roadmap. The recent introduction of the Integration Cell may provide long-term benefits, but in the short term, customers may experience increased complexity managing multiple gateway runtimes.
- **Marketing execution:** SAP's marketing efforts are concentrated within its own ecosystem and proprietary events, with less engagement in external developer communities or industrywide API and AI conferences. This results in low brand recognition and limited developer awareness outside the SAP customer base.

Sensedia

Sensedia is a Leader in this Magic Quadrant. Its API management offering is part of the Sensedia Platform, which provides API design tools, an API portal, monitoring and other API life cycle management features. The broader platform also includes AI Gateway, Integrations, Events Hub, Service Mesh and Adaptive Governance (a distributed API governance solution). The platform is available in SaaS and hybrid deployment models. Sensedia's current product focus is on multigateway API governance, its AI gateway, MCP gateway and AI agent governance.

Sensedia's operations are primarily in Latin America, with a growing presence in North America and some presence in Europe. Its clients are organizations of all sizes, predominantly in banking and finance.

Strengths

- **Market understanding**: Sensedia recognizes the importance of API governance as part of AI enablement of applications, as evidenced by its continued investment in API governance capabilities. The vendor's regional strengths include a recognition of the effects of sovereignty on API management.
- **Vertical/industry strategy:** Sensedia's knowledge of banking regulations and their effect on API governance differentiates the company from most other vendors that offer general-

purpose API management solutions. It has effectively marketed this deep expertise to financial services customers in South America and other regions where it operates.

- **Geographic strategy:** Sensedia's focus on South America differentiates it from all other vendors in this evaluation and makes the company worthy of consideration to customers in that region. Its local presence and knowledge of the region's regulations can give them an advantage over more geographically distributed competitors.

Cautions

- **Marketing execution:** Sensedia has limited awareness among potential customers in North America and Europe. As a result, they are less likely than other vendors to appear on customers' shortlists for new API management implementations.
- **Sales strategy:** Sensedia's sales investments outside of South America have yet to translate into a significant redistribution of sales revenue. Less than 25% of Sensedia's sales are from outside of its home region.
- **Market responsiveness:** Sensedia has delivered AI Gateway, agentic and MCP capabilities, albeit somewhat later than other Leaders. It delivers MCP server generation and governance across multiple third-party gateways, but lags behind competitors in MCP registry and agent-facing discovery capabilities at the time of this evaluation.

SmartBear

SmartBear is a Niche Player in this Magic Quadrant. It offers Swagger as a unified API life cycle offering, comprising Studio, Portal, Catalog, Explore, Functional Test and Contract Test; and ReadyAPI for enterprise-grade functional, security and performance testing. Its products are offered on-premises and as SaaS. SmartBear does not have a native API gateway, but it partners with third-party API gateway providers to deliver these capabilities. SmartBear's current focus is on Swagger Agents to improve developer productivity, BearQ for testing and quality assurance, and MCP server generation.

SmartBear's customers are mainly in North America and Europe, and its clients are organizations of all sizes.

Strengths

- **Marketing strategy:** SmartBear's refocus on the Swagger brand after a few years of de-emphasis enables the company to better connect with its community roots. This

connection supports a product-led growth approach to its commercial solutions and resonates more strongly with developers.

- **Product strategy:** SmartBear integrates API discovery and design with functional, enterprise and contract testing, supporting API development that can complement API gateways from vendor partners. By focusing on gateway-agnostic governance and testing, SmartBear allows organizations to use its design and testing tools with their existing gateway infrastructure, providing flexibility across the API life cycle.
- **Business model:** SmartBear has expanded its partnerships with vendors like AWS and Atlassian through marketplaces. The company's new product and marketing leadership provides customers with a new reason to revisit and reinvest in SmartBear solutions.

Cautions

- **Market understanding:** SmartBear's emphasis on application integrity may resonate more with customers interested in testing than API management. The company places less focus on runtime operations, lacking a native API gateway and relying on third-party partners. SmartBear also trails competitors in AI gateway and MCP infrastructure, and its platform is often viewed as a set of separate products rather than a unified solution.
- **Innovation:** SmartBear's lagging support for AI use cases suggests a relative lack of vision in the role of APIs with AI agent development. Customers should explore SmartBear's product roadmap and decide when to complement SmartBear's offering with third-party tools, such as AI or MCP gateways.
- **Geographic strategy:** SmartBear's customer base and revenue are concentrated in North America and Europe, with limited presence elsewhere. All direct support is provided only in English, and services outside these regions rely on third-party partners. Customers in non-English-speaking or regulated markets should assess if this support model meets their needs.

Traefik Labs

Traefik Labs is a Niche Player and a new entrant in this Magic Quadrant. It offers Traefik Hub, an API management platform built on the open-source Traefik Proxy. It handles API, LLM and AI agent traffic with a declarative control plane managed via GitOps. The offering includes Hub API Gateway, Hub API Management, Traefik AI Gateway and Traefik MCP Gateway. Traefik Labs' offering is predominantly self-hosted across customer-managed environments,

including on-premises, private cloud, managed Kubernetes services in any major public cloud, and the edge. It also offers a hybrid option with vendor-managed, cloud-based control planes.

Traefik Labs' enterprise customers are spread across North America, Europe and Asia/Pacific.

Strengths

- Operations: Traefik Labs emphasizes secure, compliant operations through a memory-safe Go codebase, integrated high-performance WAF and FIPS 140-3 compliant cryptography. It also provides full support for air-gapped, offline deployments to meet strict regulatory and data sovereignty requirements.
- Business model: Traefik's extensive open-source adoption and status as the default ingress controller in leading Kubernetes distributions give it a broad and engaged user base, including for Ingress NGINX replacement. This foundation enables a highly effective product-led growth strategy, allowing buyers to upgrade from Traefik Proxy to Traefik Hub's commercial platform with minimal friction.
- Pricing: Traefik offers predictable, unmetered, instance-based pricing with flat annual subscriptions per licensed gateway instance. This model eliminates transaction-based overage fees, allowing buyers to scale API and AI workloads without unexpected cost increases.

Cautions

- Overall viability: Traefik Labs has a large open-source user base, but it has a relatively low number of paying customers and is not yet profitable. Its lean model and partnership strategy support growth, but execution and enterprise scalability remain areas to monitor.
- Marketing strategy: Traefik's conversion of its open-source user base into paid offerings remains relatively limited, although it targets senior DevOps, Platform and Engineering decision makers across modernization, migration and transformation use cases.
- Product: Traefik Hub centrally manages Traefik gateway instances, but does not federate third-party gateways. Additionally, management and governance feature gaps — including limited AsyncAPI/Kafka life cycle management, SOAP/WSDL support, load testing and product-manager analytics — may limit its suitability for complex enterprise environments.

Tyk

Tyk is a Visionary in this Magic Quadrant. It offers the Tyk platform, which includes the open-source Tyk Gateway, Tyk Developer Portal and Tyk Dashboard, alongside its Universal Data Graph for unifying APIs and data sources through GraphQL. The platform also includes Tyk Governance for federated API governance and Tyk AI Studio for AI management. It is available as SaaS through Tyk Cloud, as a hybrid deployment combining a Tyk-managed control plane with customer-managed gateways, or fully self-managed. Tyk maintains broad feature parity across its deployment models and supports highly controlled and fully air-gapped environments.

Tyk is headquartered in the U.K. and its operations are geographically distributed. Its clients tend to be midsize and large organizations.

Strengths

- **Market understanding:** Tyk demonstrates strong alignment with the needs of digitally mature and regulated enterprises by supporting multiprotocol APIs, event-driven architectures and open-standards governance. The platform is built for high performance, consistently delivering low-latency results in independent benchmarks, and is fully API-driven to support advanced automation and GitOps-native workflows.

- **Customer experience:** Tyk provides a high-quality, engineering-led support model, with all global support delivered directly by experienced engineers. This approach has resulted in consistently high customer satisfaction ratings on Gartner Peer Insights.

- **Product strategy:** Tyk maintains feature parity across SaaS, hybrid and self-managed deployments, including fully air-gapped environments, and the majority of its customer base chooses self-managed environments. This enables organizations to deploy Tyk according to their security, compliance and operational requirements without sacrificing functionality or control.

Cautions

- **Marketing execution:** Tyk has a smaller operational footprint and marketing reach compared to larger competitors, resulting in lower brand awareness among business decision makers and a limited partner network for enterprise deployments.

- **Product:** Tyk's capabilities for gateway federation and for API and AI integration are limited compared to competitors. Tyk Governance only supports basic third-party gateway discovery and cataloging, with no native runtime policy control. Tyk also offers fewer

prebuilt connectors, requiring customers to manually integrate external tools for testing and automation.

- **Vertical/industry strategy:** Tyk's platform and go-to-market approach are largely horizontal, with few dedicated features, compliance templates or accelerators for industries outside of financial services. Buyers in sectors such as healthcare, retail or the public sector may find limited out-of-the-box support for their specific regulatory and operational requirements.

Workato

Workato is a Challenger in this Magic Quadrant. It offers the Workato API Platform as part of its wider Workato One suite for integration, automation and AI orchestration. Workato provides a low-code-focused approach to API management, and it provides capabilities for MCP creation, management and deployment, and AI, MCP and API gateways in a single governed control plane. Customers typically pair its API management offering with its integration capabilities. Workato can be deployed as SaaS, and it manages all components for its customers.

Workato's operations are geographically diversified, and its clients are midsize through large organizations across multiple industries.

Strengths

- **Marketing strategy:** Workato has a differentiated "agentic-APIM" strategy that connects MCP gateways, AI gateways and automation across its integration platform. It drives adoption through global events, CIOnews.com, an always-free developer sandbox supported by AI providers such as OpenAI, Anthropic and LangChain, and targeted competitive replacement programs with dedicated microsites and migration assistance.
- **Operations:** With its centrally managed and deployed infrastructure, Workato eliminates the burden on IT departments to manage API gateway deployments. It rolls out more than 600 updates per year with zero downtime and backward compatibility. The platform scales dynamically with load, and Workato reports high customer satisfaction and Net Promoter Scores due to its platform reliability.
- **Customer experience:** Workato delivers strong customer support, as reflected in its high ratings on Gartner Peer Insights. It provides frontline support through its live chat app,

AssistIQ, which is designed to outperform its SLA commitments, and offers its embedded AI solution architect, AIRO, for in-context troubleshooting and support within the platform.

Cautions

- **Product strategy:** Workato does not offer customer-operated or fully air-gapped deployments. It enforces policies locally through On-Premises Agents and the API Edge Gateway, while the control plane remains Workato-managed. Virtual Private Workato provides single-tenant isolation, with Workato managing operations and upgrades. Organizations with mandatory air-gap requirements should assess whether this model meets their standards.

- **Business model:** Workato's platform is designed for organizations seeking a broad set of capabilities spanning integration, agentic AI, automation and API management. While its API management capabilities can be adopted independently, organizations that require a stand-alone API management tool they can deploy, run and manage themselves should assess whether Workato meets their requirements.

- **Product:** Compared with other vendors, Workato API Platform offers more limited capabilities for API portals, monetization and documentation. Its portal is geared primarily toward internal or private B2B APIs, with less support for public-facing APIs, and its monetization features remain basic. Although Workato has delivered MCP and AI agent capabilities, several key API management features are still developing.

WSO2

WSO2 is a Leader in this Magic Quadrant. It offers WSO2 API Platform, an open-source platform, available as self-managed, vendor-managed, SaaS and hybrid deployments. The platform includes API Gateway, AI Gateway, API Control Plane (formerly Bijira), AI Workspace, Developer Portal and MCP Hub, and Monetization.

WSO2's operations are geographically distributed, and its focus is on complex, regulated industries.

Strengths

- **Product:** WSO2 continues to invest in AI capabilities across the complete API management process. It has embedded Moesif into the core platform, adding extra capabilities in monetization and observability. It also extended its federation capabilities and fully adopted the Arazzo Specification to provide API flows and products to its customers.

- **Product strategy:** WSO2 API Platform is positioned as a platform, and buyers have the flexibility to purchase it as a whole or in its constituent parts. It supports deployments on-premises and in cloud and hybrid environments. The addition of Monetization (based on Moesif) adds significant new capabilities for observability, monetization and FinOps (SaaS only) for APIs, MCP and AI. These capabilities enable WSO2 customers to meet the new sovereign AI mandates adopted by many countries.
- **Business model:** This was flagged as a caution in 2025, but WSO2 has returned to growth while adding options for existing customers to migrate to newer platforms without hard cutoff dates. Its parent company, EQT, appears to view WSO2 as a strategic part of its portfolio, as investments continue in both its open-source and commercial products.

Cautions

- **Marketing execution:** WSO2 continues to have limited mindshare among buyers and users. While Gartner inquiry data shows an improvement in getting its message out to market, WSO2's marketing execution still significantly lags the other Leaders. WSO2's shift to prioritizing messaging around hybrid deployments, while Monetization is available only as SaaS, may create confusion for users regarding support, pricing and deployment flexibility.
- **Marketing strategy:** WSO2 continues to focus on technical consumers, with a message focused on both API management and AI governance. The shift from platform to modular messaging has yet to gain awareness when buyers are seeking API management solutions that are quick to implement.
- **Operations:** WSO2's shared SaaS deployments are restricted to the U.S. East in North America and Northern Europe for the whole of Europe, with enhanced regional availability for hybrid deployments and improved SLAs available for an increased price. Its status page is rudimentary and provides little usable information compared to other vendors.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Traefik Labs

Dropped

- Solo.io

Inclusion and Exclusion Criteria

To qualify for inclusion, providers need to:

- Actively market, sell and support products that provide the capabilities defined in the Market Definition for API Management.
- Have made the qualifying offering generally available as of June 2025.
- Have a comprehensive, general-purpose offering not specific to one industry or limited to an adjacent market (such as iPaaS or application security). This offering has to be available either directly from the vendor or via publicly announced agreements with partners.
- Have generated revenue of at least $50 million (constant currency) from API management in 2025. Vendors of an open-source or open-core product had to have generated at least $5 million in revenue (constant currency) per year from API management. No more than 90% of this revenue should have come from one geographic region.
- Have had at least 150 paying customers for API management in 2025, or have at least 500,000 open-source users for the relevant product.

Honorable Mentions

The providers that are most relevant to our clients were selected for evaluation in this Magic Quadrant. However, the decision not to evaluate a provider does not mean that the provider lacks viability. The following are noteworthy providers not included in the formal analysis. These providers could be appropriate for clients, contingent on their requirements:

APIwiz: The APIwiz API Management Platform provides API discovery, governance, security, life cycle management and analytics across multiple gateways, cloud environments and

teams. Its gateway-agnostic control plane supports distributed environments and includes API design, development, testing, security, observability and marketplace monetization. APIwiz primarily serves customers in Asia/Pacific, with additional presence in North America and the Middle East, and offers professional services for governance, modernization and migration.

DigitalAPI: DigitalAPI provides API management and governance using an OpenAPI-first approach. Its components include an API gateway, catalog, developer portal and API marketplace, with AI capabilities for API design, development, testing and management. Its MCP gateway exposes and governs existing APIs and MCP servers for AI agents. Prebuilt APIs and industry content are available for banking, healthcare and insurance.

Treblle: Treblle offers a runtime intelligence platform offering API discovery, observability, security, governance and cataloging. Its federated platform supports technology leaders, enterprise architects, and CIOs managing API and AI environments, with a unified view of APIs across cloud environments, gateways and technologies.

Evaluation Criteria

Ability to Execute

We used the following criteria to assess each vendor's Ability to Execute.

Product or Service

We evaluated each vendor's capabilities for required, standard and optional capabilities, as laid out in the Market Definition. This includes:

-Critical Capabilities scores against each of the capabilities, as defined in the accompanying critical capabilities definitions

-Advanced capabilities to enable API-based and AI-based business models, monetization, and automated governance

-Support for emerging agentic and AI trends and approaches, as well as effective use of AI to improve the product and developer experience

Overall Viability

For each vendor, we considered:

-Its relative size in terms of customers and revenue, and the scale, strength and resilience of its ecosystem

-The impact of past acquisitions and the potential for future acquisitions

-The financial stability and continuity of its offerings in this market

-The ability and effectiveness of its partnerships to improve viability

-The size and quality of its active user community relative to its target market

-The availability and effectiveness of professional and consulting services

Sales Execution/Pricing

For each vendor, we considered:

-Revenue and customer growth

-The number of projects implemented and their business impact, and whether (and how) professional and consulting services have eased implementations

-The clarity and predictability of pricing models — on-premises, cloud, multicloud and hybrid — and their changes over time

-The ability to handle large and complex deals, including support and flexibility for volume growth, seasonality and predictability

-Its product-led growth initiatives

Market Responsiveness and Track Record

For each vendor, we evaluated its ability to:

-Quickly adapt and offer meaningful solutions to the emerging needs of API programs and to meet or exceed the fast pace of change

-Respond well to evolving conditions in the API management market

-Deliver superior alternatives that align with competitive trends, even if they do not lead those trends

Marketing Execution

For each vendor, we assessed the degree to which it has:

-Captured mindshare, demonstrated thought leadership and gained a solid reputation in the market

-Effectively devised and executed go-to-market strategies with substantial results

-Appeared on competitive shortlists for API management bids

-Executed short-term and long-term winning strategies

-Executed marketing and partnership programs to expand its influence

Customer Experience

For each vendor, we considered:

-The specificity and quality of domestic and international support contracts and SLAs for the availability of its API management offerings

-Its track record of resolving customer issues

-The customer experience offered through acquisitions and partnerships

-Support outside the vendor's home region

-The reach and availability of service implementers, and efforts to expand these, such as training and certification programs

-How long existing customers are supported and the disruptions experienced when they are forced to move platforms for the vendor's convenience

Operations

For each vendor, we considered:

-Its track record of meeting SLAs and its privacy certifications

-The scale of its workforce and data centers

-Reliability of its hosted service platforms (for cloud offerings), and scalability and adaptability of its software platforms (for on-premises deployments)

-Use of, and adherence to, metrics for efficiency, speed of change and implementation of new features

-The security of operations and relevant certifications

-Its use of AI and other modern practices to optimize and gain operational efficiencies

Ability to Execute Evaluation Criteria	
Evaluation Criteria	***Weighting***
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	Medium
Operations	Medium

Source: Gartner (September 2026)

Completeness of Vision

We used the following criteria to assess each vendor's Completeness of Vision.

Market Understanding

We assessed each vendor's understanding of:

-Present and future customer priorities, use cases and challenges, and the evolution of such priorities

-The role of APIs and API management in software development, AI engineering, agentic AI, modernization, composable, cloud-native and resilient architectures, and productization.

-The maturity of API management, governance and complexity.

-The impact and opportunities of AI on the production and consumption of APIs.

-Support for emerging approaches in AI and software engineering.

-General, geographic and industry-specific market opportunities.

Marketing Strategy

We assessed each vendor's strategy for:

-Clear articulation of an offering's value proposition in the context of the customer's business

-Top-line and differentiated messaging by buyer persona

-Competitive positioning

-Growing developer mindshare and communities

-Carving out winning strategies for short-term and long-term

-Thought leadership, evangelism, conferences, industry leadership and partnerships

Sales Strategy

We assessed each vendor's strategy for:

-The right balance of direct and indirect sales vehicles

-Sales in specific geographies and to specific industries, such as the financial services, public sector, manufacturing, telecom, healthcare, insurance and retail sectors

-A sound business plan and an effective strategy that uses presales, business model innovation, activities that demonstrate thought leadership, and professional and consulting services.

-Focusing on the benefits of API management

-Capitalizing on developer mindshare

-Product-led targeting and growth

Offering (Product) Strategy

We assessed:

-Offering plans and roadmaps (with target dates)

-Track record, future maturity and completeness

-The offering's overall design concept and architecture

-Alignment to market demands and trends

-Specific strategies to capitalize on AI and agentic trends

-Seamless and effective use of partner offerings (where applicable) to extend and enhance the vendor's offerings

Business Model

We examined:

-How the vendor targets or maintains profitability

-Alignment and positioning, and packaging and pricing strategies to sell cloud, multicloud, hybrid or on-premises offerings

-Partnerships and their effectiveness and viability in offering a comprehensive solution to customers

-The vendor's professional and consulting services, how it recognizes revenue and capitalizes on investments in research and development, and its growth strategies across regions (including mergers and acquisitions)

Vertical/Industry Strategy

We examined:

-The industries that the vendor focuses on, the industry-specific solutions (if any) that it offers, and how successful or differentiating these solutions are (or are likely to be)

-Industry-specific blueprints, accelerators and starter kits

-Leadership in developing API standards for specific industries or groups, and interoperability

-Support for specific industries where active, regulatory or business transformations are occurring around the world

Innovation

We assessed:

-How the vendor plans to innovate in terms of technology, business, industry and customer service

-How effectively and systematically innovative ideas are filtered and funneled through product development

-Specific, planned use of AI to improve the offering and its customer-facing features

-The vendor's track record of anticipating or leading new trends in the market

-Novel and unique approaches, solutions and products resulting from, or likely to result in, transformative change in the market

Geographic Strategy

We assessed each vendor's ability to:

-Identify and engage with the most promising locations for its capabilities

-Expand into geographies not explicitly addressed at present

-Fulfill nondomestic projects via support centers, sales offices and partner networks

-Support complex international requirements and features, such as regional-specific compliance with local laws and regulations

Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Market Understanding	High
Marketing Strategy	Medium

Evaluation Criteria	*Weighting*
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Low
Innovation	High

Source: Gartner (September 2026)

Quadrant Descriptions

Leaders

Leaders are vendors that execute strongly, leading and driving the vision in the market. Rece entrants to this market that have a limited record of execution are less likely to be Leaders; tl same applies to strongly executing vendors that are overly risk-averse or do not effectively exploit innovation trends.

Leaders tend to have a vision and a market understanding to address diverse API use cases, such as AI and agent management, mobile/web back-end APIs, internal API management, productizing APIs and distributed API management.

Vendors can become Leaders in this market by acquiring another well-positioned vendor, integrating its technology into a wider application infrastructure offering and keeping up with the pace of API management innovation. Additionally, they should address emerging AI and agentic use cases, digital transformations, regulatory demands and modernization initiatives, and their challenges head-on, with thought leadership and product functionality. Finally, they can become Leaders by offering widely deployable, well-supported API management solutions for a number of industries and geographies.

Leaders understand the market trends that will benefit them and their clients' business strategies by enabling them to restructure their business operations or advance agentic and

digital transformations. Leaders see the business potential of API programs, communicate this potential to business units and help their clients realize that potential.

Challengers

Challengers generally execute the types of work for which they offer functionality well, but they have a lagging or incomplete view of the market's direction, sometimes due to a lack of innovation, marketing and sales focus on API management.

The future of these providers depends on how aggressive and proactive they are in addressing their current shortcomings. If they innovate to fulfill the pressing requirements of today's API and AI programs and market their offerings effectively, they will likely become Leaders. Otherwise, they may become Niche Players or Visionaries, or they may drop out of the Magic Quadrant. They may also remain Challengers, but this market's strong dynamics and fast evolution over the past 18 months indicate that even maintaining their current position will require them to evolve.

Visionaries

Visionaries approach this market from an innovative angle. They are typically smaller in terms of revenue and market share compared to Leaders and Challengers, and they may offer an incomplete set of functionalities. However, they have the power and mindshare to grow their capabilities, often in a different way from established Leaders.

Results of this Magic Quadrant iteration show 2026 is an active year of change and growth for some Visionaries, as they improved their Ability to Execute and became Leaders and Challengers, while others receded to become Niche Players.

Visionaries generally make good acquisition targets for established, larger players that want to buy their way into the Leaders quadrant. Acquisitions are likely and will continue to play a vital role in the market dynamics in the coming years.

Niche Players

Niche Players focus on a segment of the market. That segment is typically defined by a specific application or application infrastructure ecosystem, or by another characteristic, such as industry, client size and spending power, geographic area, or open-source orientation. Niche Players have either an effective strategy but a focus on a particular market niche, or shortcomings in terms of execution or innovation.

Niche Players may trail in market understanding and innovation because of less investment, or because they deliberately occupy a niche within the market. Their execution is limited by size or a deliberate segment.

Niche Players' Ability to Execute is limited to their focus areas and is assessed accordingly. Their ability to innovate and survive in this market is limited by their narrow focus, but they often tend to move much faster than vendors in other quadrants. Niche Players can progress to other quadrants by improving their marketing strategy and fostering innovation.

Context

APIs and modern integration protocols are essential for today's software, digital ecosystems and AI products. Managing and governing APIs is now critical for every organization, as API infrastructure quickly becomes AI infrastructure. Platforms must handle various types of APIs, multicloud setups, and new AI-driven traffic from autonomous agents and real-time events.

API and AI control systems are merging. Generative AI helps automate API tasks, but the biggest change is that autonomous AI agents are now the main API users. Interfaces are shifting from simple API portals to machine-readable documentation and MCP server catalogs and registries, aimed at securely exposing enterprise resources to AI. API gateways have evolved to manage AI traffic, enforce cost controls, cache results, provide safety guardrails, and ensure agent actions are traceable to humans.

Running multiple API gateways across clouds is now commonplace, but shadow AI and unmanaged MCP servers create risks like cost overruns and data leaks. To address this, companies use federated management, decoupling central governance from local gateways. Lightweight agents discover and catalog APIs, events, and MCP servers across platforms into a unified catalog, enabling consistent security, compliance and audit trails while allowing teams to choose their own tools.

Software engineering and AI leaders should identify their API and AI management and governance needs and use this Magic Quadrant to select the best vendors.

Market Overview

The API management market generated $4.35 billion in revenue in 2025, up from $3.88 billion in 2024, and continued to grow at a rate of 12.4% (see Market Share: Enterprise Software, Worldwide, 2025). While this rate of growth is slower than prior years, the sustained double-digit growth of this well-established market indicates that organizations are recognizing API management as a must-have capability.

Market Trends

Since 2025, the API management market has evolved substantially in the following ways:

- **Rise of AI Gateways and Model Context Protocol (MCP):** The adoption of LLMs and generative AI is turning API gateways into AI traffic mediators. Support for MCP enables secure, governed access for AI agents. Features like vector-based semantic caching and in-line security guardrails are making AI use cases central to API management.
- **Shift from Multigateway Sprawl to Federated API Management:** Organizations are moving from fragmented, multigateway setups to federated API management. This trend enables unified control, consistent policies, and streamlined developer access across platforms — without the need for disruptive migrations.
- **Expansion of API Consumers to AI Agents and Nondevelopers:** API consumers now include AI engineers, product managers and autonomous agents. APIs must provide machine-readable contracts and rich metadata, while portals add AI-native testing and automated spec enrichment for better accessibility.
- **Consumption-Based Pricing and Token FinOps:** AI-driven API usage is driving up costs and complexity. Enterprises require gateways with granular token tracking, real-time cost controls and integrated billing to manage and predict spending.
- **Intensifying Competition and Market Consolidation:** API management vendors face rising competition from hyperscalers and AI gateway specialists. Adjoining markets are consolidating into the API governance space, driving acquisitions and unified platform strategies.

What Customers Need to Know

The API management market is rapidly evolving, driven by AI adoption, federated architectures and new consumption models. Most vendors still focus on specific stages of the API life cycle, and offer comprehensive, end-to-end solutions — especially as new requirements like AI gateways, MCP support, and federated control planes emerge. Some

vendors lack native gateways or advanced AI mediation, relying on integration with third-party tools. Buyers must closely evaluate product capabilities, especially around AI readiness, federated management and cost transparency, to ensure alignment with their unique needs.

API management vendors are increasingly tailoring their offerings to serve these five customer segments:

- Organizations developing AI capabilities and agentic automation, seeking solutions with AI gateways, MCP support and robust security guardrails.
- Organizations focused on legacy modernization and integration, needing seamless support for both traditional and AI-driven APIs.
- Organizations advancing digital strategies and API monetization, requiring unified developer portals and transparent, consumption-based pricing.
- Organizations building multicloud and cloud-native architectures looking for federated management and cross-cloud support.
- Organizations elevating API governance and security across complex, multicloud, multivendor environments, demanding consistent policy enforcement and federated oversight.

Given the pace of change and increasing competition, customers should prioritize vendors that demonstrate innovation in AI integration, federated management and cost control, while ensuring the solution fits their current and future integration landscape.

Before doing detailed vendor evaluations, customers must work with stakeholders across their organization to identify their specific use cases. Then, use this research and the companion Critical Capabilities for API Management to select the most suitable API management offering.

⊕ Evaluation Criteria Definitions

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