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Global AI Agent Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Agent market size is expected to reach $ 434318 million by 2032, rising at a market growth of 58.0% CAGR during the forecast period (2026-2032).

An AI Agent is evolving from a conversational interface into a software-based execution unit capable of planning, coordinating and completing business tasks. Its core functionality includes goal interpretation, task decomposition, knowledge retrieval, tool use, memory management, environment interaction, result verification and human escalation. This scope differentiates AI Agents from foundation models, conventional chatbots and basic generative AI assistants that primarily create content or answer questions. A production-grade AI Agent may connect with three to twenty enterprise systems, execute five to fifty steps in a complex workflow and operate over timeframes ranging from seconds for routine actions to hours for research, software engineering or cross-system processes. Commercial deployment also requires identity management, least-privilege access, audit logs, execution budgets, exception handling and approval controls. The value chain spans foundation models and computing infrastructure, Agent frameworks and runtime platforms, data and knowledge systems, enterprise connectors, vertical applications, implementation and managed services. Revenue is generated through software subscriptions, usage-based fees, runtime consumption, enterprise licences, private deployment and professional services.

The competitive landscape combines large enterprise platforms, model-native companies and specialist Agent vendors. Microsoft generated approximately USD 1.84 billion in AI Agent revenue in 2025, equal to 17.44% of the global market. Google, ServiceNow, Anthropic and Alibaba accounted for 7.03%, 6.48%, 5.91% and 4.61%, respectively, taking the combined share of the five largest vendors to 41.46%. Microsoft benefits from the integration of Agent creation, Microsoft 365, enterprise identity,

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application connectors and Azure infrastructure. Google combines workspace access, cloud data services and an open developer ecosystem, while ServiceNow embeds AI Agents directly into IT service management, customer operations and employee workflows. Anthropic follows a model-native route centred on software development, computer use and complex reasoning tasks. Alibaba combines cloud infrastructure, DingTalk, commerce and enterprise services. SAP, Amazon Web Services, IBM, Baidu and OpenAI form the next group of leading participants, with differentiated positions in ERP, Agent runtime infrastructure, enterprise orchestration, search and knowledge services, and general-purpose task execution.

Regional demand reflects differences in software ecosystems, industrial structures and enterprise procurement behaviour. North America generated USD 4.28 billion in 2025, accounting for 40.50% of the global market, supported by a dense concentration of foundation model companies, hyperscale cloud platforms, enterprise software vendors and specialist start-ups. Asia-Pacific reached USD 3.64 billion and a 34.46% share, with China, Japan and South Korea advancing through cloud services, super-app ecosystems, manufacturing, telecommunications and local digital platforms. Europe represented 21.15% of global revenue, or USD 2.23 billion, with stronger emphasis on ERP, industrial operations, financial services, public-sector workflows and sovereign deployment. Latin America and the Middle East and Africa remain smaller markets, but financial services, customer operations, government digitalisation, energy and smart-city projects provide a long runway for adoption.

China has become a significant component of the global market. The thirteen leading Chinese vendors generated approximately USD 2.14 billion in AI Agent revenue in 2025, representing 20.29% of the global total. Alibaba, Baidu, ByteDance, Tencent and iFlytek were the leading domestic participants. The Chinese market is differentiated by the integration of AI Agents with cloud platforms, content ecosystems, e-commerce, workplace software, telecommunications networks and industry delivery capabilities. Alibaba and Baidu combine cloud and enterprise development platforms with commerce or search entry points; ByteDance and Tencent use content, communication and developer ecosystems; iFlytek, Huawei and telecom operators concentrate on education, healthcare, government, manufacturing and network operations. This structure gives Chinese vendors strong access to high-frequency use cases and large domestic distribution channels.

Application demand is broadening from general interaction to core operational workflows. Office and collaboration represented 14.27% of 2025 revenue, followed by software development at 13.80%, customer service at 12.97% and general-purpose

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Agents at 12.29%. Together, these four applications accounted for 53.33% of the market. Sales and marketing represented 9.18%, while data analytics and BI, IT operations and cybersecurity, and e-commerce and retail accounted for 7.33%, 6.77% and 6.75%, respectively. Finance, manufacturing, healthcare, education and legal services currently have smaller revenue shares, but their requirements for specialised data, regulatory controls and complex workflows create higher barriers to entry. E-commerce and retail are expected to record a 63.74% CAGR during 2026–2032, while customer service, healthcare and office collaboration are also expected to grow faster than the overall market.

The latest stage of industry development is centred on long-horizon execution, multi-Agent coordination, open communication standards and controlled runtime environments. Agent platforms increasingly combine web search, file handling, code execution, enterprise connectors, trajectory monitoring, evaluation and security policies within a unified engineering environment. Multi-Agent systems assign separate planning, execution, review and specialist roles to complex workflows, while open protocols allow Agents built on different models and platforms to communicate. Long-term memory, identity, policy controls and auditability are becoming prerequisites for deployment in finance, healthcare, IT and industrial systems. The competitive focus is shifting from the number of Agents created to task completion rates, human intervention levels and cost per successful task. OpenAI has continued to expand long-horizon execution and sandbox capabilities, Google has advanced cross-platform Agent communication and enterprise orchestration, and enterprise software leaders are embedding Agents directly into established workflows.

Report Scope

This report studies the global AI Agent demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Agent, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AI Agent that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Agent total market, 2021-2032, (USD Million)

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Global AI Agent total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: AI Agent total market, key domestic companies, and share, (USD Million)

Global AI Agent revenue by player, revenue and market share 2021-2026, (USD Million)

Global AI Agent total market by Deployment, CAGR, 2021-2032, (USD Million)

Global AI Agent total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global AI Agent market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Microsoft, Google, ServiceNow, Anthropic, SAP, Amazon Web Services (AWS)?, IBM, OpenAI, Oracle, Salesforce, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world AI Agent market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Deployment, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AI Agent Market, By Region:

United States

China

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Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Agent Market, Segmentation by Deployment:

Public Cloud SaaS

Private/On-premise Deployment

Edge/Endpoint Deployment

Global AI Agent Market, Segmentation by Autonomy Level:

L0-L1 Low Autonomy

L2 Tool Invocation

L3 Multi-step Autonomy

L4 Multi-agent/Continuous Autonomy

Global AI Agent Market, Segmentation by Interaction Pattern:

Conversational

Embedded Copilot

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Event-driven

Others

Global AI Agent Market, Segmentation by Application:

General Intelligent Agent

Office and Collaboration

Software Development

Customer Service

Sales and Marketing

Data Analysis and BI

IT Operation and Cybersecurity

E-commerce and Retail

Finance

Manufacturing

Healthcare

Education

Law

Others

Companies Profiled:

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Microsoft

Google

ServiceNow

Anthropic

SAP

Amazon Web Services (AWS)?

IBM

OpenAI

Oracle

Salesforce

Aisera

SoundHound

Fujitsu

Cognition

UiPath?

Naver

LangChain

Kakao

PKSHA Technology

Voiceflow

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Teneo.ai

Mistral AI

AirOps

Sema4.ai

Gumloop

Stack AI

Relay.app

CrewAI

Alibaba

Baidu

ByteDance

Tencent

iFlytek

Huawei

China Mobile

China Telecom

JD

Beijing Kingsoft Office Software

Knowledge Atlas Technology

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MiniMax

Marketingforce

Key Questions Answered

1. How big is the global AI Agent market?
2. What is the demand of the global AI Agent market?
3. What is the year over year growth of the global AI Agent market?
4. What is the total value of the global AI Agent market?
5. Who are the Major Players in the global AI Agent market?
6. What are the growth factors driving the market demand?

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