

Intelligent Process Automation Market Forecasts to 2032 – Global Analysis By Component (Solutions/Platforms, and Services), Technology (Artificial Intelligence (AI) & Machine Learning (ML), and Robotic Process Automation (RPA)), Deployment Mode (On-Premise, and Cloud-Based), Organization Size, Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Intelligent Process Automation Market is accounted for \$19.6 billion in 2025 and is expected to reach \$76.9 billion by 2032, growing at a CAGR of 21.5% during the forecast period. Intelligent Process Automation (IPA) combines artificial intelligence, machine learning, and robotic process automation to streamline and enhance business operations. It enables systems to handle repetitive tasks, make data-driven decisions, and continuously improve performance with minimal human input. By integrating cognitive technologies such as natural language processing and computer vision, IPA boosts efficiency, reduces errors, and helps organizations achieve smarter automation for faster, more accurate, and cost-effective workflows.

Market Dynamics:

Driver:

Rising demand for operational efficiency and cost reduction

The primary driver for Intelligent Process Automation (IPA) adoption is the relentless corporate pressure to streamline operations and reduce overhead. Organizations are leveraging IPA to automate complex, rule-based business processes, which minimizes

manual intervention, slashes operational costs, and drastically reduces human error. This drive for efficiency not only improves bottom lines but also frees up human capital to focus on higher-value strategic tasks, thereby enhancing overall productivity and competitive agility in a fast-paced business environment.

Restraint:

Data security and privacy concerns

A significant barrier to IPA adoption is the apprehension surrounding data security and privacy. These platforms require access to sensitive corporate and customer data to function, creating substantial vulnerabilities to breaches and non-compliance with stringent regulations like GDPR. The fear of intellectual property theft, financial fraud, and reputational damage makes organizations, especially in highly regulated sectors, cautious. Consequently, ensuring robust data governance and security protocols within IPA solutions is a critical challenge that vendors must overcome to gain wider market trust.

Opportunity:

Development of industry-specific solutions

Generic platforms often fail to address unique regulatory and workflow challenges in sectors like banking, healthcare, or manufacturing. By offering pre-configured solutions that comply with industry standards and tackle niche processes, vendors can unlock new revenue streams. This specialization allows for deeper market penetration and provides clients with faster implementation and a higher, more tangible return on investment, driving accelerated adoption.

Threat:

Intense competition from new entrants

The market faces a notable threat from the influx of new entrants, including agile startups and specialized software firms. These players often introduce innovative, niche solutions at competitive prices, intensifying market rivalry and putting pressure on established vendors. Furthermore, this saturation can lead to price wars, potentially compressing profit margins for all participants. Incumbent players must continuously innovate and differentiate their offerings to maintain market share against these

disruptive and cost-effective alternatives.

Covid-19 Impact:

The COVID-19 pandemic acted as a significant accelerant for the IPA market. Lockdowns and remote work mandates exposed the vulnerabilities of manual, paper-based processes, forcing businesses to urgently seek digital automation solutions to ensure operational continuity. This crisis underscored the value of IPA in maintaining business resilience, leading to a surge in adoption across functions like finance, HR, and customer service to stabilize workflows and manage sudden demand fluctuations in a distributed work environment.

The solutions/platforms segment is expected to be the largest during the forecast period

The solutions/platforms segment is expected to account for the largest market share during the forecast period as it constitutes the core technological offering that enables automation. This includes the essential software, platforms, and tools that organizations directly deploy to automate processes. The high share is driven by continuous initial investments in foundational automation technology, coupled with the need for robust, scalable, and integrated platforms that can manage complex enterprise-wide workflows, making it the indispensable centerpiece of the IPA ecosystem.

The artificial intelligence (AI) & machine learning (ML) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the artificial intelligence (AI) & machine learning (ML) segment is predicted to witness the highest growth rate as these technologies represent the evolution from simple rule-based automation to cognitive, self-improving systems. Their integration is crucial for handling unstructured data, making predictive decisions, and managing complex exceptions that traditional automation cannot. Furthermore, as businesses seek more intelligent and adaptive operations, the demand for AI/ML capabilities within IPA solutions is accelerating rapidly, fueling this segment's exceptional growth trajectory.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. This dominance is attributed to the early and widespread adoption of advanced technologies, the presence of major IPA vendors, and a strong emphasis on

operational efficiency across well-established financial and IT sectors. Additionally, high levels of investment in digital transformation initiatives and a mature infrastructure provide a fertile ground for the sustained deployment of IPA solutions across the region.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. This accelerated growth is fueled by rapid digitalization, expanding manufacturing and service sectors, and increasing investments in AI and cloud technologies from countries like China, India, and Japan. Moreover, the growing need to improve cost competitiveness and the supportive government policies towards industrial automation are driving the aggressive adoption of IPA solutions among small, medium, and large enterprises throughout the region.

Key players in the market

Some of the key players in Intelligent Process Automation Market include UiPath Inc., Automation Anywhere, Inc., SS&C Blue Prism, IBM Corporation, Microsoft Corporation, SAP SE, Appian Corporation, Pegasystems Inc., ServiceNow, Inc., NICE Ltd., ABBYY LLC, Tungsten Automation, WorkFusion, Inc., Accenture plc, Deloitte Touche Tohmatsu Limited, Genpact Limited, Tata Consultancy Services Limited, Infosys Limited, Cognizant Technology Solutions Corporation, and Capgemini SE.

Key Developments:

In November 2025, Automation Anywhere announced the acquisition of Aisera to strengthen its agentic automation and conversational AI offerings.

In October 2025, IBM unveiled new software and infrastructure capabilities to help enterprises operationalize AI, including agentic and infrastructure automation announcements.

In June 2025, Accenture launched its Distiller agentic AI framework (AI Refinery™) to accelerate scalable, industry-grade agentic AI solutions.

In May 2025, ServiceNow launched AI Control Tower and introduced AI Agents/AI Platform innovations at Knowledge 2025 to govern and orchestrate enterprise AI agents and workflows.

Components Covered:

Solutions/Platforms

Services

Technologies Covered:

Artificial Intelligence (AI) & Machine Learning (ML)

Robotic Process Automation (RPA)

Deployment Modes Covered:

On-Premise

Cloud-Based

Organization Sizes Covered:

Large Enterprises

Small and Medium-sized Enterprises (SMEs)

Applications Covered:

Data Capture and Validation

Customer Service & Support

Fraud Detection and Risk & Compliance Management

Invoice Processing and Accounts Payable

HR Onboarding and Employee Lifecycle Management

Supply Chain and Logistics Management

Other Applications

End Users Covered:

BFSI (Banking, Financial Services, and Insurance)

IT & Telecommunications

Healthcare & Life Sciences

Retail & E-commerce

Manufacturing

Government & Public Sector

Energy & Utilities

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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