

Magic Quadrant pour la gestion des API

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L'IA transforme la gestion des API, stimulant l'innovation et engendrant de nouvelles exigences en matière de sécurité et de gouvernance. Ce Magic Quadrant évalue 17 fournisseurs et offre aux responsables de l'ingénierie logicielle un guide pour adopter des solutions avancées au service d'écosystèmes d'API agiles et résilients.

Définition/Description du marché

Gartner définit le marché de la gestion des interfaces de programmation d'applications (API) comme le marché des logiciels permettant de gérer, de gouverner et de sécuriser les API.

Les API modernisent les architectures informatiques . Elles fournissent le contexte, les outils et les ressources nécessaires aux programmes d'IA générative et agentielle, et permettent d'accéder aux systèmes, services, partenaires et services de données . Les outils de gestion des API permettent aux organisations de planifier, déployer, sécuriser, exploiter, gérer les versions et mettre hors service leurs API, quels que soient leur taille, leur région ou leur secteur d'activité .

Fonctionnalités obligatoires

- **Portail API** : Fournit une interface en libre-service permettant aux utilisateurs d'API de découvrir et de tester des API . Un catalogue d'API est nécessaire pour l'enregistrement des API.
- **Passerelle API** : Fournit, ou s'intègre à, des passerelles pour la gestion en temps réel, la sécurité, l'application des politiques, la limitation du débit, le contrôle opérationnel et la surveillance de l'utilisation des API.
- **Gestion des politiques** : Permet l'application des styles, la médiation API, les limites d'utilisation, la limitation du débit et les configurations de sécurité.

- **Gouvernance** : Gère les versions de l'API, le contrôle d'accès, la publication et le fonctionnement.

Caractéristiques communes

- **Conception d'API** : Ces fonctionnalités offrent une expérience de développement pertinente et des outils pour concevoir des API et permettre leur utilisation dans les systèmes existants.
- **Tests d'API** : Offre une gamme de fonctionnalités de test, allant des tests de simulation de base aux tests fonctionnels, de performance et de sécurité avancés des API.
- **Surveillance et analyse** : Capacité à produire, collecter et communiquer des indicateurs opérationnels et des statistiques pertinentes pour la consommation d'API.
- **Sécurité** : Capacité à protéger les API contre les activités malveillantes et à s'intégrer à l'infrastructure de sécurité existante ; à appliquer les règles de gestion des identités et des accès ; à garantir la sécurité dès la conception et tout au long du processus opérationnel.
- **Support de passerelle IA** : Fournir sécurité, médiation et gestion du trafic pour l'accès de l'IA aux données et ressources de l'entreprise.
- **Prise en charge des protocoles d'IA** : Prise en charge des implémentations de protocoles émergents tels que le Model Context Protocol (MCP) et Agent2Agent (A2A).
- **Productivité optimisée par l'IA** : vise à améliorer l'expérience des développeurs, leur productivité et la rigueur opérationnelle (par exemple, lors de la génération de spécifications d'API, de la documentation des API, de l'obtention d'analyses d'utilisation ou de l'optimisation du trafic).
- **Fédération de passerelles** : La capacité de gérer plusieurs instances et formats de passerelles, y compris les passerelles API tierces.
- **Médiation API** : Fonctionnalités permettant de mettre en œuvre des services composites, la médiation de services, ainsi que le mappage et la traduction de protocoles.
- **Maillage de services** : Capacité à s'intégrer ou à gérer le trafic vers et depuis les solutions de maillage de services.

- **Monétisation** : La capacité de mettre en œuvre des modèles de tarification, des stratégies de facturation, des méthodes de refacturation ainsi que de commercialiser et de promouvoir des produits API.

Quadrant magique

Figure 1 : Quadrant magique pour la gestion des API



Gartner

Points forts et points faibles des fournisseurs

Services Web Amazon

Amazon Web Services (AWS) figure parmi les Challengers de ce Magic Quadrant. Il propose Amazon API Gateway, qui prend en charge le prototypage, la conception et la mise à l'échelle automatique pour gérer des volumes importants d'appels de passerelle. AWS propose deux options distinctes, avec des tarifs différents, pour Amazon API Gateway : les API REST, qui incluent la gestion des clés API, des plans d'utilisation et la prise en charge du pare-feu d'applications web (WAF) ; et les API HTTP, une option plus économique avec moins de fonctionnalités. Récemment, AWS s'est concentré sur la création de domaines personnalisés pour les API REST privées destinées aux secteurs réglementés, l'amélioration des fonctionnalités de sécurité d'exécution et la prise en charge des charges de travail d'IA. Amazon API Gateway est disponible exclusivement en mode SaaS.

Les activités d'AWS sont réparties géographiquement. Ses clients comprennent des organisations de toutes tailles.

Points forts

- **Stratégie géographique :** AWS exploite un réseau mondial de centres de données, ce qui lui permet de fournir des services cloud à des clients situés dans de nombreuses régions. Cette infrastructure prend en charge des organisations de toutes tailles et de tous secteurs, en veillant à la constance des performances et au respect des réglementations locales. AWS continue d'étendre son réseau de centres de données à travers le monde.
- **Opérations :** AWS a enregistré plus de 140 000 milliards de requêtes API en 2024, soit une augmentation de 40 % par rapport à 2023. La capacité d'AWS à prendre en charge des environnements à hautes performances, notamment en termes d'évolutivité et de disponibilité, surpassé celle des autres fournisseurs évalués. Amazon API Gateway gère également plus de 400 000 comptes à travers le monde, opérant à une échelle qui surpassé celle de la plupart de ses concurrents.
- **Pricing:** Amazon API Gateway's pay-as-you-go pricing, combined with volume-based discounts, offers customers greater flexibility than the committed consumption models used by some other vendors. It has no hourly fees or charges for idle resources.

Cautions

- **Market understanding:** Amazon API Gateway continues to be treated as a product for managing APIs built within the AWS ecosystem. Customers hosting APIs in locations outside of AWS should compare Amazon API Gateway to alternatives that offer greater flexibility in deployment across cloud vendors.

- **Product strategy:** Amazon's offering lacks a native API portal, a key feature commonly offered by other vendors in this Magic Quadrant. It also trails other vendors in API design and testing tools, as well as built-in support for API monetization and gateway federation. As a result, AWS clients must carefully evaluate their reliance on third-party solutions for these capabilities.
- **Innovation:** While AWS demonstrates strong operational capabilities in API management, particularly in scalability and availability, it continues to trail other evaluated vendors in delivering core API management features. Additionally, many emerging capabilities — such as those related to AI — remain on a roadmap, which raises concerns about AWS' pace of innovation in the API management space.

Axway

Axway is a Leader in this Magic Quadrant. It offers the Amplify Platform, which encompasses Amplify API Management, Amplify Engage (a centralized marketplace and API registry) and Amplify Fusion (an integration platform as a service [iPaaS]). Amplify API Management includes API Gateway, API Portal, API Builder, agents for API discovery, subscription management, traceability, and analytics. Axway offers flexible deployment options, such as on-premises, private cloud, public cloud, hybrid environments, and a SaaS model.

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

In September 2024, Axway acquired Sopra Banking Software (SBS) and then reorganized into a new umbrella enterprise software group called 74Software.

Strengths

- **Product strategy:** Axway has recently introduced Amplify Fusion, its iPaaS, and continues to lead in federated API management — a feature highly valued by customers. The Amplify Platform provides discovery, subscription, traceability, and productization of APIs across multiple cloud environments and platforms, including support for third-party gateways such as AWS and Azure. This comprehensive approach positions Axway strongly for organizations seeking hybrid and multigateway API management solutions.
- **Business model:** Axway maintains profitability for its API management segment and uses strategic acquisitions — including DXChange.io and Sopra Banking Software — and partnerships — such as with Stoplight, Ping, Noname, Graylog, and Traceable — to its

advantage. The formation of 74Software has further enhanced Axway's market valuation and strengthened its position in banking and financial services.

- **Operations:** Axway's operations demonstrate strong internationalization capabilities, with multilanguage support across its Amplify Engage product, developer portals, and documentation. API providers can deliver localized user interfaces and content — including navigation and technical documentation — in multiple languages and formats.

Cautions

- **Marketing execution:** Axway has relatively low awareness among software engineers and developers. Its marketing has not expanded visibility beyond its reputation for managed file transfer and B2B integration, resulting in decreased visibility in developer communities, as reflected in Gartner inquiries and other customer interest metrics.
- **Market responsiveness:** Axway has been slower to deliver advanced AI features during the past year compared with competitors, as it has focused on building iPaaS capabilities and restructuring its product stack around events. For example, at the time of writing, it has yet to release MCP server capabilities or features to support agentic AI initiatives.
- **Sales execution:** Axway's sales of Amplify API Management grew at a rate well below the market average (based on Gartner estimates), and the company added fewer paid customers last year compared with its competition. Customers should monitor Axway's product roadmap to ensure continued alignment with their API management needs.

Boomi

Boomi is a Leader in this Magic Quadrant. It offers Boomi API Management as part of the Boomi Enterprise Platform, which also includes iPaaS, AI agent management, data management, data integration, workflow, data catalog, event streams, and low-code development capabilities. Boomi's renewed offering supports its own API gateways and those from third-party vendors. The management plane for Boomi API Management is delivered as a multitenant SaaS offering. Runtime components can be deployed in various environments, including SaaS, dedicated cloud, on-premises, or hybrid options.

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

Strengths

- **Market understanding:** Boomi had a turnaround year in terms of its vision for API management, supported by strong executive backing and a dedicated team. Boomi's new vision emphasizes API discovery, security, and agentic AI, showing a reduced reliance on iPaaS as its sole differentiator.
- **Product strategy:** Boomi revamped its API management offering in 2024, building on its recently acquired products (APIIDA and TIBCO Mashery) to create an integrated offering. It now offers a well-rounded platform featuring federated management, cloud-based runtime, discovery and AI capabilities, alongside a strong roadmap. The platform also supports centralized management and governance of APIs across disparate and third-party gateways without impacting runtime traffic or latency.
- **Business model:** Boomi has expanded operations across North America, Europe, and Asia/Pacific and has notably ramped up partnership sales, particularly with ServiceNow and AWS. This expansion has introduced Boomi to a larger pool of new prospective customers.

Cautions

- **Sales execution:** While Boomi's API Management revenue grew modestly above the market average in 2024, its overall API Management revenue and market share are still relatively smaller than those of other Leaders in this research. It also derives a relatively small portion of its total revenue from API Management.
- **Marketing execution:** Compared with competitors, Boomi's marketing efforts for API Management have limited direct engagement and dedicated resources for the developer community. Customers still perceive Boomi's marketing as being focused more on business and technology leaders than on developers and engineers.
- **Customer experience:** Some customers have reported difficulty in integrating with third-party gateways and building complex integration scenarios. While Boomi offers AI-assisted design and incremental AI adoption, customers with nonstandard API management use cases may require additional support to meet their needs.

Google

Google is a Leader in this Magic Quadrant. Its Google Cloud offers Apigee API Management, Application Integration, Apigee Advanced API Security, and Google Cloud API Gateway, which are SaaS products that are part of Google Cloud. Google Cloud also offers Apigee

hybrid and Cloud Endpoints, a lightweight API management solution, to run in customer-managed environments. In September 2024, Google Cloud introduced Apigee API Hub, which provides a common layer for Apigee-registered API discovery and governance across managed cloud and hybrid instances.

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

Strengths

- **Innovation:** Google Cloud delivered the Agent Development Kit for Apigee API Hub in 2Q25, which aims to simplify API design and development for both human and agent developers, and provides A2A and MCP support. It also introduced Model Armor to strengthen its AI and API security.
- **Product strategy:** Apigee API Management enables customers to monetize LLM traffic and AI tools, providing numerous new revenue streams for API products. Google Cloud also offers Apigee Advanced API Security, an add-on that leverages Google Cloud's AI capabilities to detect harmful API use.
- **Customer experience:** Google Cloud's products provide a stable, secure API management backbone for organizations of any size — provided that the organization has dedicated, knowledgeable engineering and operations teams that can run the products. When organizations have the right expertise, Apigee can fulfill the most complex API management use cases, though organizations can also use Google Cloud's API Gateway for lightweight API management use cases.

Cautions

- **Sales strategy:** Google Cloud continues to position its API management products as add-ons for GCP instead of as stand-alone tools. Apigee customers report that Google Cloud is still urging them to migrate (based on client interactions). Apigee hybrid deployment option also requires Google Cloud setup for the management plane. This focus on selling GCP does not resonate with customers that do not plan to use Google Cloud.
- **Market understanding:** Apigee is a relatively complex product primarily designed for the strategic API management requirements of larger enterprises, especially Apigee Edge and Apigee hybrid customers. Prospective customers that are not able to fund a dedicated expert team for Apigee should evaluate simpler alternatives that provide lightweight API gateways.

- **Pricing:** While there have been positive changes to Apigee pricing models, some long-term Apigee customers express concern about the high cost of the platform versus the benefit received.

Gravitee

Gravitee is a Leader in this Magic Quadrant. It offers Gravitee, a platform that includes API Design, API Access Management, Alert Engine, API Developer Portal, API Gateway, and API Management. Users can access a limited, open-source version of Gravitee or purchase the commercial product, which is available as SaaS, on-premises, and as a hybrid deployment.

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

Strengths

- **Product strategy:** Gravitee provides customers with independence from a prescribed cloud platform, enterprise application or iPaaS vendor. Its support for numerous deployment models, gateway federation, and design and testing capabilities make it a good choice for customers seeking a flexible, unified API management platform.
- **Market responsiveness:** Gravitee has responded quickly to interest in API management's role in AI-enabled applications by offering an AI gateway, supporting MCP and working toward its vision of an agentic mesh.
- **Sales execution:** Although it is still one of the smaller vendors in terms of revenue, Gravitee reports 70% year-over-year growth, demonstrating greater execution, as its simple pricing and deployment flexibility make it an attractive alternative to incumbent solutions.

Cautions

- **Marketing execution:** As a relatively smaller vendor, Gravitee lags other Leaders in terms of brand awareness and is therefore less likely to be evaluated by potential new customers. Gravitee's marketing activities have yet to significantly increase its visibility to potential customers.
- **Vertical/industry strategy:** Gravitee continues to lack any industry-specific content or accelerators. Potential customers in regulated industries — such as financial services and healthcare — should carefully assess whether Gravitee can meet their needs.

- **Geographic strategy:** Gravitee's customer base continues to be primarily in Europe, with only about 15% of customers in North America and few customers in other regions. Prospective customers outside of Europe should ask Gravitee about the level of service and support available in their region.

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 a comprehensive set of integration, API management, event automation, B2B, and managed file transfer (MFT) capabilities. IBM also offers Noname Advanced API Security for IBM, which is an OEM product of Akamai.

IBM API Connect is available as SaaS, as a customer- or IBM-managed deployment in a hybrid environment, as a part of IBM Cloud Pak for Integration Integration, and as a part of the new IBM webMethods Hybrid Integration platform.

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

Strengths

- **Product:** IBM API Connect offers strong technical capabilities for the entire API management life cycle. IBM's broad coverage of technical features is valued by organizations looking for a strong API management product that addresses diverse use cases.
- **Market responsiveness:** IBM has responded to customer demand for deployment flexibility with strong support for hybrid, multicloud, and on-premises deployments. The company has also delivered new features for API visibility, prompt management and LLM routing.
- **Geographic strategy:** IBM serves customers of all sizes across every region and industry, including large global enterprises. Its global appeal is driven by localized sales and support, an extensive partner network, and the recent acquisition of the webMethods business, along with a continued focus on mature markets.

Cautions

- **Product strategy:** After IBM's acquisition of webMethods in July 2024, it now offers two API management products: IBM API Connect and webMethods. While IBM has presented a convergence strategy and roadmap to bring the two products together in 2025, prospective customers should insist on IBM's plans for this convergence and its commitment to features that are critical to customers' purchase decisions.
- **Marketing execution:** IBM's approach for promoting API Connect primarily targets existing large enterprise customers that have well-established IBM environments. As a result, few customers outside of the IBM ecosystem evaluate API Connect. Moreover, IBM's enterprise focus does not effectively reach potential customers with more developer-oriented projects.
- **Sales execution:** While IBM remains one of the largest API management vendors by revenue, Gartner estimates that sales growth for API Connect has lagged behind the overall market. Prospects seeking advanced capabilities to drive their API strategies may overlook the strong product features IBM offers.

Kong

Kong is a Leader in this Magic Quadrant. Its API management offering includes Kong Konnect (SaaS) and Kong Enterprise to support self-managed deployments. Kong provides core components such as Kong Gateway — a commercial version of its open-source API gateway — and Kong Insomnia — an open-source-based tool for API design, testing and documentation. Kong offers AI Gateway to provide centralized control, observability, cost control and security for LLM access and MCP servers. Kong also offers Event Gateway, which provides mediation and security when exposing event brokers as event APIs.

Kong supports diverse deployment options — such as on-premises, vendor-managed cloud and multicloud — through its Dedicated Cloud Gateways and service mesh deployments via Kong Mesh.

Kong's operations are geographically distributed. Its clients tend to be midsize and large organizations.

Strengths

- **Innovation:** Kong has delivered AI-driven features such as API and spec generation, automated MCP server creation, and enhanced event management capabilities. Kong

aims to leverage Konnect's Service Catalog to enable seamless, real-time API discovery and consumption for AI coding tools like Cursor.

- **Market responsiveness:** Over the past year, Kong has addressed previous product gaps by expanding its Dedicated Cloud Gateways with the aim of supporting GCP, AWS, Azure, and additional regions, and by launching Serverless Gateways. The company has also integrated AI Gateway, Kong Mesh, and its new event gateway.
- **Marketing execution:** Kong maintains a strong market presence through advertising, events, partnerships and participation in major cloud marketplaces. Its product-led growth strategy has contributed to increased customer adoption of Kong Insomnia. Kong's recent appointment of a new chief commercial officer reflects its ongoing focus on commercial strategy.

Cautions

- **Vertical/industry strategy:** Kong continues to lack vertical-focused product features or customized solutions that would appeal to specific industries. Potential customers in regulated industries such as financial services or healthcare should carefully assess whether Kong can meet their needs.
- **Customer experience:** Via Gartner inquiry and Peer Insights, Kong users have reported complexity and a steep learning curve. Customers have also expressed confusion about its service-based pricing structure and the separate charges they received for plugins, portals, testing, and design features and analytics.
- **Geographic strategy:** Compared with other Leaders, Kong has a limited presence in some regions, including Latin America, the Middle East, and Africa. Customers in these regions should seek clarification from Kong regarding the level of service and support that it can provide.

Microsoft

Microsoft is a Challenger in this Magic Quadrant. It offers Azure API Management (APIM), which provides a fully managed API gateway hosted on Azure. APIM can be deployed as self-hosted API gateways on Kubernetes.

Microsoft also offers separate products that are part of its overall API management solution. These include: Azure API Center, a centralized API catalog for design-time governance; Defender for APIs, an AI-powered security tool integrated with Microsoft Defender for Cloud;

TypeSpec, an API design and linting tool; and Kiota, a tool that generates client libraries for calling APIs.

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

Strengths

- **Product strategy:** Azure APIM provides a competitive API gateway with advanced token management and support for AI protocols such as MCP. Azure APIM integrates seamlessly with platform-added features such as Microsoft Defender for APIs and Azure AI Content Safety, which provide additional security across the entire platform.
- **Pricing:** Microsoft offers several pricing tiers for Azure APIM, including a free version, a consumption-based option, and Premium tiers with unlimited API calls. The Premium tiers can be significantly less expensive for customers with high-traffic APIs.
- **Market responsiveness:** Microsoft has moved rapidly to add AI capabilities into its portfolio, with the addition of an AI gateway pattern and support for MCP. It has also started improving some areas of Azure APIM, especially the API portal.

Cautions

- **Product:** Azure APIM provides a number of separate services that could be used to create a complete solution. While this provides flexibility, it places added responsibility on procurement to assemble the right components. Azure APIM also has poor support for managing other API gateways. While Azure API Center can catalog APIs from all sources, many of the tracking processes are manual.
- **Vertical/industry strategy:** Microsoft avoids providing vertical-focused solutions with Azure APIM, such as prebuilt policies and API definitions for banking, healthcare, and other industries. Users with industry-specific requirements will need to contract with Microsoft partners to customize their solutions.
- **Deployment flexibility:** While Microsoft supports deployment of self-hosted API gateways on-premises, a relatively small percentage of clients actually use this option rather than its fully managed solution on Azure. This deployment model still requires a control plane running in Azure, which is a limitation for prospective customers that want or need fully on-premises deployments.

Postman

Postman is a Visionary in this Magic Quadrant. Postman offers the Postman API Platform, featuring capabilities such as Collections, Workspaces, Flows, Vault, and both Public and Private API Networks, as well as the recently added shared Partner Workspaces for secure collaboration with external partners. Postman also offers AI capabilities that include Postbot for design and testing, MCP Server support, and AI Agent Builder for autonomous APIs.

The platform enables users to organize, design, consume, test, and collaborate on APIs, and is available as a SaaS offering on AWS. While Postman does not provide its own API gateway, it integrates with — and supports publishing API definitions to — multiple third-party gateways. Postman operates primarily in the U.S., EMEA, and Asia/Pacific regions, serving organizations of all sizes.

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

Strengths

- **Innovation:** Postman was one of the first vendors in this market to deliver an AI code assistant for designing and testing APIs (Postbot). Other innovative features include storing and managing API keys with Postman, the API Network for partner collaboration, as well as recent MCP support, AI Agent Builder, Guided Authorization, and Flows Actions.
- **Product strategy:** Postman's product strategy continues to evolve into a full-stack API platform with strong capabilities for API testing, design, and development of internal and external API portals. Its strong emphasis on AI-native capabilities, enhanced governance, improved collaboration, and a continued focus on developer experience is appealing to product managers and API developers.
- **Market responsiveness:** Postman continues to introduce new features on a monthly basis and is quick to act on customer feedback in its releases, such as adding real-time security and design linting, support for more API types (including GraphQL, gRPC, and WebSocket), greater API collaboration, AI governance and orchestration, and version control across multiple environments.

Cautions

- **Product:** Postman does not provide a native API gateway, as in previous years. Customers must still rely on independently sourced third-party gateways and vendors for runtime

execution and operational management features.

- **Deployment flexibility:** Postman's platform is SaaS-first and hosted on AWS. It has some hybrid-compatible components that customers can execute locally or in their own environments using Vault, Postman CLI, the Lightweight API Client, and the Insights Agent. Customers needing on-premises or alternative cloud deployments must continue to look for other solutions.
- **Sales strategy:** Postman maintains a permanent free tier for teams of up to three users and provides a free lightweight client for offline/local testing. However, its continued focus on converting free users to paid plans while prioritizing enterprise deals could mean some users with budget constraints need to look for alternatives.

Salesforce (MuleSoft)

Salesforce (MuleSoft) is a Leader in this Magic Quadrant. Its API Management offering is part of Anypoint Platform, which includes Anypoint Flex Gateway, Anypoint API Manager, Anypoint API Designer, and Anypoint API Governance. The platform also features Anypoint API Experience Hub (an API portal) and Anypoint Exchange (a hub for sharing APIs and related integration and automation assets). The platform supports on-premises, cloud and hybrid deployments.

MuleSoft's operations are geographically distributed, and its customers are mainly midsize and large organizations. The formerly independent MuleSoft organization is now fully integrated under Salesforce.

Strengths

- **Sales strategy:** MuleSoft maintains a strong global sales presence and partner network, and it effectively uses a product-led growth model. The company successfully expanded into the small and midsize business (SMB) market segment by packaging API Management as a stand-alone offering. More than 30% of MuleSoft's business now comes from SMBs.
- **Business model:** MuleSoft has focused on deepening integration within the Salesforce ecosystem (to cross-sell to existing Salesforce customers). This approach has succeeded in attracting a large customer base. In 2024, MuleSoft continued to hold the largest market share by revenue in API management and achieved above-average growth (14.4% compared with the market average of 12.6%).

- **Marketing execution:** MuleSoft effectively promotes its API Management due to its excellent top-down marketing, very active community engagement, and widespread customer awareness of the Salesforce brand. MuleSoft conducts strong developer advocacy and training and certification programs to broaden its market reach.

Cautions

- **Pricing:** In Gartner client inquiries, the Anypoint Platform continues to be cited as one of the more expensive API management offerings. MuleSoft customers stated that the pricing structure is complex and that overage charges lead to unexpected costs. Customers should carefully evaluate MuleSoft's pricing structure to ensure it aligns with their budgets.
- **Innovation:** MuleSoft has released support for AI features — such as MCP servers and AI gateways — for API Management. However, at the time of evaluation, it trailed other Leaders in this area. Additionally, MuleSoft's new product features are often perceived as being reactive or driven by Salesforce's priorities, rather than market leading.
- **Product:** MuleSoft's API management offering remains competitive overall, but continues to exhibit limitations in its capabilities for API monetization, gateway federation and API testing compared with other Leaders in this research.

SAP

SAP is a Challenger in this Magic Quadrant. It offers API Management as a capability of SAP Integration Suite, which is part of the SAP Business Technology Platform (SAP BTP). API Management includes an API gateway, a developer hub for APIs, Graph, and Edge Integration Cell. It is offered in various SAP Integration Suite editions, including the API and Events edition. SAP API Management's gateway is based on an on-premises version of Google Cloud's Apigee gateway.

SAP API Management remains a managed multicloud environment that can be hosted by Alibaba Cloud, AWS, GCP, Microsoft Azure, or SAP. It also supports hybrid deployments of API gateways at the edge of on-premises networks and in private clouds.

SAP's operations are geographically distributed. Its clients tend to be midsize and large organizations.

Strengths

- **Industry/vertical strategy:** SAP API Management provides strong support for the needs of many industries, especially when combined with other capabilities in SAP Integration Suite. It provides free prebuilt adapters for industries such as banking, energy, education and the public sector, as well as industry-specific security options across XML and JSON payloads.
- **Deployment flexibility:** SAP provides cloud and hybrid deployment options. Customers can deploy the Edge Integration Cell — a lightweight API gateway — across their infrastructure. All gateways are managed by one cloud-based control plane to give a single view across complex environments.
- **Geographic strategy:** SAP operates in many countries and has a worldwide partner network, enabling it to provide customers with a greater level of local expertise than most other vendors in this evaluation. It also provides the ability to define geographic routing rules across API gateways, which can be deployed across multiple data centers for immediate disaster recovery.

Cautions

- **Offering:** SAP API Management continues to rely on OEM agreements for its API gateway (Google Cloud's Apigee) and messaging and events (Solace). Potential customers should be aware of these dependencies and understand that SAP does not fully control every aspect of its solution.
- **Innovation:** SAP's reliance on OEM agreements also hampers its ability to react quickly to changing market conditions. Compared with the Leaders in this Magic Quadrant, it has been slower in responding to trends such as AI gateways and MCP support. These items are on SAP's roadmap for 2025, so potential customers should look out for when these features will be production ready.
- **Business model:** SAP API Management continues to appeal primarily to existing SAP customers. While SAP is looking to entice more workloads onto its platform, non-SAP users continue to opt for other independent solutions for API management.

Sensedia

Sensedia is a Challenger 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 Integrations, Events

Hub, Service Mesh and SMART API Governance (a distributed API governance solution). The platform is available in SaaS and hybrid deployment models.

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

Strengths

- **Market responsiveness:** Sensedia has responded well to customer demand for gateway federation, AI use-case support and AI enablement, having added Sensedia AI Copilot, an AI gateway and MCP support.
- **Vertical/industry strategy:** Sensedia has deep expertise in providing solutions for the banking and financial services industry, particularly in meeting regional banking and insurance requirements in regions where it operates. This industry focus differentiates Sensedia from most other vendors that offer general-purpose API management solutions.
- **Marketing strategy:** Sensedia has effectively marketed its knowledge of the financial services industry. This messaging has resonated with banking and financial services customers in South America and other regions where it operates, which has enabled Sensedia to outperform larger vendors among those customers.

Cautions

- **Marketing execution:** Sensedia focuses its marketing and services primarily in South America, resulting in low awareness in North America and Europe. Organizations outside the Americas should confirm the level of service available in their region.
- **Sales execution:** Sensedia's efforts to establish more of a sales presence in North America and Europe have only resulted in a small percentage of customers in those regions. Additionally, Sensedia's paid customer growth across all regions has been relatively low.
- **Overall viability:** Sensedia is a leading vendor in this market in South America based on Gartner revenue estimates. However, it holds a relatively low market share in other regions, especially among commercial vendors. This makes it difficult for consideration in vendor shortlists for organizations looking for large commercial partners, despite its strong product capabilities.

SmartBear

SmartBear is a Visionary in this Magic Quadrant. It offers SmartBear API Hub, which includes multiple API management capabilities: API Design, Functional Test, Explore, Portal, and Contract Testing. SmartBear also offers ReadyAPI for API testing and Stoplight for API design and design governance.

SmartBear primarily focuses on API development and incorporates open-source API design and testing tools based on the open-source communities Swagger, Pact, SoapUI, Spectral, Prism, and Elements. Its products are offered both on-premises and as SaaS, with many customers using the SaaS option. SmartBear does not have a native API gateway, instead partnering with third-party API gateway providers to deliver these capabilities.

SmartBear's customers are geographically distributed, and its clients are organizations of all sizes.

Strengths

- **Market understanding:** SmartBear demonstrates a strong understanding of API developers' needs throughout the entire API development life cycle. Its products offer comprehensive features for API design, testing, linting, mocking, and governance to effectively support these requirements.
- **Marketing execution:** SmartBear effectively showcases its thought leadership and creates customer demand by educating the market on key API management challenges, including governance, productization, and testing.
- **Business model:** SmartBear has a history of improving the completeness of its API management offering by leveraging key acquisitions such as Reflect (for AI-powered API testing), Stoplight (for API design), and PactFlow (for contract testing). As a result, end users can leverage a more integrated and comprehensive platform that brings together leading tools to support diverse API development and testing needs.

Cautions

- **Market responsiveness:** Though several enhancements were in Beta or on its roadmap at the time of evaluation, SmartBear lags other vendors in this research in terms of support for MCP, AI agent protocols, and the use of AI to enhance the product experience.
- **Product strategy:** SmartBear's API Hub is designed to offer a unified, integrated platform for developers, combining design tools, multiple testing products, and an API portal. However, customer feedback suggests that the user experience across these tools and

roles is not yet fully seamless. Additionally, while SmartBear integrates with leading API gateways, it does not currently provide its own native API gateway solution.

- **Vertical/industry strategy:** For industries such as banking and healthcare, SmartBear does not offer accelerators or customized solution packages. Where customers have industry-specific requirements, they should assess whether SmartBear is appropriate for their needs.

Solo.io

Solo.io is a Niche Player in this Magic Quadrant. It offers the Gloo platform, which includes Gloo Gateway, an Envoy-based API gateway based on the open-source Kgateway project, and Gloo Mesh, an enterprise service mesh. Solo.io primarily focuses on API management in Kubernetes environments. Solo.io is offered as installable software.

Solo.io's operations are primarily in North America, Europe and Asia/Pacific. Its clients are organizations of all sizes.

Strengths

- **Market responsiveness:** Solo.io's active engagement in open-source communities for Kubernetes, Istio and Envoy enable it to understand evolving developers' needs and deliver product features that meet new demands, such as introducing an AI gateway.
- **Product strategy:** Solo.io focuses on cloud-native development by offering a declarative API gateway, ingress control, and strong support for service mesh and service-service interaction patterns. This makes it a desirable choice for developers in engineering-savvy organizations seeking lightweight gateway options for microservices and application development.
- **Business model:** Solo.io provided the core of its API management features to the Cloud Native Computing Foundation (CNCF) as an open-source project named Kgateway. Kgateway serves as a low- or no-cost entry point for new users, who can upgrade to Solo.io's paid offering, Gloo Gateway, to access a more complete API management solution.

Cautions

- **Marketing strategy:** Solo.io's emphasis on the technical aspects of its product — such as Kubernetes support, service mesh and Envoy proxies — does not resonate with business buyers, who gravitate toward vendors with a more business-oriented focus.

- **Sales strategy:** Solo.io's relatively small size and developer focus make it challenging to effectively sell to large enterprises. Despite its efforts to target the replacement of competitors for enterprise-wide deployments, prospects may overlook Solo.io as a viable alternative.
- **Vertical/industry strategy:** Solo.io does not provide tailored solutions for industries such as healthcare and banking. Prospective customers with industry-specific compliance requirements should assess whether Solo.io is appropriate for their needs.

Tyk

Tyk is a Visionary in this Magic Quadrant. It offers the Tyk platform, which includes Tyk Gateway (an open-source API gateway), Tyk Developer Portal, Tyk Dashboard and the Tyk console (an infrastructure management tool), alongside its Universal Data Graph (a GraphQL interface). Tyk's platform is offered as SaaS or as self-managed deployments. It focuses on enabling cloud-native microservices, governing APIs across diverse development teams and integrating API-based data using GraphQL.

Tyk's operations are geographically distributed. Its clients tend to be midsize and large organizations.

Strengths

- **Market understanding:** Tyk's new focus is integrating AI into its platform to improve its core API management functionality. In 2024, Tyk released AI Studio and AI Gateway, and plans to continue building out its AI capabilities in 2025. Tyk is also positioned as a competitive alternative in the GraphQL space.
- **Pricing:** Tyk offers pricing models that are consistent across its deployment options, including cloud SaaS, hybrid SaaS, and self-managed. In the past year, Tyk simplified its pricing structure by reducing the number of packages from seven to three, renaming its models for clarity and adjusting list prices to align with the platform's capabilities.
- **Customer experience:** Customer feedback and Gartner Peer Insights indicate that Tyk achieves high levels of customer satisfaction, often exceeding that of competitors. Customers frequently highlight Tyk's support as a strength, with all support provided in-house by a globally distributed team.

Cautions

- **Marketing strategy:** Tyk lacks a consistent, clear messaging and marketing narrative to match its technical strengths. Furthermore, the company's marketing efforts are primarily developer-focused, resulting in limited visibility among business users and a constrained partner network compared with competitors. These factors may inhibit broader adoption and consideration of Tyk's platform.
- **Overall viability:** Tyk is a comparatively smaller operation, despite being profitable and self-funding. Its network of technology partners is also smaller than that of other vendors in this research, so customers have limited choices for implementation service providers.
- **Marketing execution:** Tyk's marketing efforts primarily target developers, and business users have limited awareness of its offering. Tyk has not generated the same level of visibility as most of its competitors.

Workato

Workato is a Niche Player and a new entrant in this Magic Quadrant. It offers the Workato API Management Platform, which includes an API gateway for mediation, authentication, access control, and rate limiting, a customizable developer portal for API discovery, and tools for API design, testing, monitoring, and analytics. The platform is primarily deployed as SaaS, with limited support for hybrid environments.

Workato's operations are geographically diversified, and its clients tend to be midsize organizations.

Strengths

- **Innovation:** Workato is focused on defining security, governance, and monitoring standards for AI agents. Its roadmap emphasizes AI capabilities across the API life cycle, including AI-driven API discovery, governance, and traffic optimization, as well as MCP support and AI-powered co-pilots for design and implementation.
- **Market understanding:** Workato's approach is to offer a comprehensive, cloud-native platform that unifies enterprise automation, API management, and AI agent integrations, aiming to make API orchestration simpler and more efficient for customers. This helps it stand out in a crowded market, despite being a new entrant.
- **Operations:** Workato centrally manages infrastructure components. This fully managed approach provides high scalability and ensures customers are always on the latest

platform release. Workato's in-product chat support provides quick response times, averaging less than five minutes.

Cautions

- **Deployment flexibility:** Workato provides limited support for hybrid environments using Virtual Private Workato, a managed Workato instance running on AWS. Customers looking to deploy Workato API Management Platform on-premises or as self-managed software will instead need to explore a multigateway strategy from other vendors.
- **Business model:** Workato's platform is designed for organizations seeking a broad set of capabilities that span integration, agentic AI, automation, and API management. Customers that need only a narrower set of capabilities should seek alternative solutions.
- **Product:** Workato API Management Platform provides limited capabilities for public-facing API portals, as its API portal is primarily used for internal use cases or for private B2B ecosystem APIs. The platform does not offer gateway federation capabilities, and customers will need to use third-party software to monetize APIs.

WSO2

WSO2 is a Challenger in this Magic Quadrant. It offers WSO2 API Manager, an open-source, self-managed solution suitable for on-premises, cloud, and hybrid deployments. WSO2 also offers Bijira (formerly known as Choreo for API Management), a SaaS platform that supports API design, deployment, security, and governance.

WSO2's operations are mostly outside North America, and its clients are organizations of all sizes.

In May 2025, WSO2 acquired Moesif, an API analytics and monetization startup. Because the acquisition occurred after our research cutoff date, Moesif's capabilities are not evaluated in this research.

Strengths

- **Product strategy:** WSO2 is investing heavily in AI capabilities across the complete API management process. Both WSO2 API Manager and the newly rebranded Bijira provide customers with stronger federated API management options, while the acquisition of Moesif shows a commitment to helping customers productize APIs.

- **Deployment flexibility:** WSO2 API Manager supports deployments on-premises, in the cloud, and in hybrid environments, in addition to Bijira, the company's SaaS API management platform. WSO2's unified control plane centralizes API management and governance across diverse gateway types, including Universal Gateway, Kubernetes Gateway, and Immutable Gateway. It can also be used to manage and govern third-party gateways like AWS API Gateway and Solace Gateway.
- **Geographic strategy:** WSO2 has customers across the globe, with Europe, Asia/Pacific, and North America leading. It has managers in every major region and delivers local service and support through direct interactions and a wide partner network. WSO2 is particularly strong in Asia/Pacific, where it originated and has established a strong market presence.

Cautions

- **Business model:** WSO2's revenue is mostly derived from WSO2 API Manager support subscriptions and hosted private cloud deployments, rather than Bijira SaaS customers. Although WSO2 has maintained revenue growth prior to and following its acquisition by EQT in 2024, the company's cloud offering still struggles to make inroads with new customers. Prospective buyers should get guarantees on the long-term commitment to WSO2 from EQT.
- **Marketing strategy:** WSO2 continues to focus on its open-source offerings as the foundation of its commercial offerings, adding its own conference and dedicated developer advocates. However, it is still firmly embedded in the developer persona, whereas API management vendors need to appeal to a wider range of buyers. Organizations adopting WSO2 may need additional support to communicate its value across the enterprise.
- **Operations:** The customer base for Bijira is relatively small compared with that of the leading SaaS API management offerings. WSO2's uptime SLA of 99.9% also lags some of its competitors, so customers with higher availability requirements should evaluate alternatives. Potential buyers should evaluate WSO2's SLAs to determine whether they match their requirements.

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

- **Workato**

Dropped

- **Software AG:** In July 2024, IBM acquired Software AG's API management product, webMethods.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, providers needed 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 2024.
- 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 had 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 2024. Vendors of an open-source or open-core product had to have generated at least \$6 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 2024.

Honorable Mentions

Gartner tracks more than 80 vendors that offer products for API management. We recognize four vendors with Honorable Mentions. Although these vendors did not meet the inclusion criteria for this Magic Quadrant, they offer API management products that may solve unique challenges for some customers. The vendors are:

- **APIwiz** — APIwiz offers the APIwiz API Management Platform, which covers all aspects of the API life cycle, but with the option of using your API gateway of choice. The platform provides a central gateway-agnostic control plane across gateways within an organization. It focuses on API design, builder, testing, governance, security, insights and observability, and monetization via an API marketplace module. With customers primarily in the Asia/Pacific region and a growing presence in the Middle East, APIwiz also provides professional services in API governance and migration services across platforms. APIwiz did not meet the revenue threshold criterion for inclusion in this Magic Quadrant.
- **DigitalAPI** — DigitalAPI offers API Management Platform for managing and securing API ecosystems. The platform includes API Governance & Lifecycle Management, API Hub, API Security, and API Analytics. DigitalAPI also offers an API Marketplace, API Gateway Manager and an API gateway called Helix Gateway. The platform provides key features for API integration, event streams, SDKs, and AI-powered API-GPT, which turns APIs into intelligent agents enabling natural language interactions. DigitalAPI did not meet the revenue threshold criterion for inclusion in this Magic Quadrant.
- **Traefik Labs** — Traefik Labs offers the Traefik Runtime Platform, which includes Traefik Proxy (an open-source cloud-native application proxy), Traefik Hub for ingress control, Traefik API gateway, GitOps-driven Traefik API Management, and Traefik AI Gateway. Traefik Labs appeals to organizations looking to modernize their operations into a cloud-native, fully declarative operating model. Traefik Labs did not meet the revenue threshold criterion for inclusion in this Magic Quadrant.
- **Treblle** — The Treblle API Intelligence platform offers API observability, discovery, security, and testing, with AI-powered additions named Alfred and Aspen. Primarily focused on observability and compliance, it is positioned as a single federated platform for development teams, helping them to understand and then design, build, and test APIs. Teams must bring their own gateways as these are not included in the core product. Treblle did not meet the revenue threshold criterion for inclusion in this Magic Quadrant.

Evaluation Criteria

Ability to Execute

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

Product or Service

For API management, we evaluated the providers' capabilities for mandatory and common features. The mandatory features, as laid out in the Market Definition, are:

- API portal
- API gateway
- Policy management
- Governance

Overall Viability

For each vendor, we considered:

- Its relative size in terms of customers, 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 in light of the dynamic nature of API programs and the fast pace of change that digital transformations increasingly demand.
- Respond to rapidly evolving conditions and deliver superior alternatives that align with competitive trends (even if they do not lead those trends).
- Support clients during unforeseen business disruptions and geopolitical events.

Marketing Execution

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

- Captured mind share, 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 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 in relation to its hosted service platforms (for cloud offerings), and scalability and adaptability in relation to 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.

Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	Medium

<i>Evaluation Criteria</i>	<i>Weighting</i>
Operations	Medium

Source: Gartner (October 2025)

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.
- 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.
- Competitiveness.
- Growing developer mind share and communities.
- 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 using presales, business model innovation, activities that demonstrate thought leadership, and professional and consulting services.
- Focus on the benefits of API management.
- The degree to which it capitalizes on developer mind share and product-led 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 with market demands and 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, 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

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Low

Source: Gartner (October 2025)

Quadrant Descriptions

Leaders

Leaders are vendors that execute strongly, leading and influencing the market. Recent entrants to this market that have a limited record of execution are less likely to be Leaders; the 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, multiexperience architecture, integration using 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 digital transformations, regulatory demands, 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 both their own and their clients' business strategies, enabling clients to restructure their business operations or advance 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 Challengers innovate to fulfill the pressing requirements of today's API 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 altogether. They may also remain in the Challengers quadrant, 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 with Leaders and Challengers, and they may offer an incomplete set of functionalities. However, they have the power and mind share to grow their capabilities, often in a different way from established Leaders.

Results of this Magic Quadrant iteration show 2024 as an active year of change and growth for some Visionaries, as they improved their Ability to Execute and became Leaders and Challengers. Others, meanwhile, 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 focus on a particular market niche, or they have 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 are the building blocks for modern software architectures and digital products. Thus, managing and governing the use of APIs is a fundamental capability for organizations of all sizes, in every industry. API management platforms help to address challenges arising from modernization initiatives, cloud computing, microservices, and ongoing security challenges.

Use of embedded AI functionality within API management products has been quite high and has added a new wave of requirements for API management. Several API management vendors have added capabilities to support AI-assisted API design, testing, and development, in addition to supporting organizations in using AI for various other use cases. Use of API gateways to mediate traffic and security between AI agents and LLM prompts has

been high too, while there has been a significant rise in agentic AI and agent-to-agent interactions.

Operating multiple API gateways from different vendors is becoming standard practice, as organizations adopt fit-for-purpose solutions to support diverse use cases, including cloud-native and serverless architectures. While this approach allows teams to leverage specialized features, it can also result in fragmented API infrastructure, making it difficult to maintain visibility, reuse, and consistent governance across all APIs. As the number of APIs and gateway instances grows, managing security and operational oversight becomes increasingly complex. To address these challenges, organizations should consider implementing a federated API management architecture. This approach provides centralized governance and control over APIs distributed across multiple gateways, helping to ensure visibility, security, and effective management in multivendor environments.

Software engineering leaders should identify their organization's API management use cases, evaluate their technical and sourcing requirements, and use this Magic Quadrant to find the right vendors to shortlist.

Market Overview

The API management market generated \$3.88 billion in revenue in 2024 and grew at a rate of 12.6% (see **Market Share: Application Infrastructure and Middleware, Worldwide, 2024**). 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 2024, the API management market has evolved in the following ways:

- Organizations are graduating from experimental generative AI use cases to mainstream AI projects and agentic AI, which means that managing APIs as data, tools, and context in a safe and secure manner becomes even more essential. Vendors have upgraded their API management platforms to support these emerging AI production patterns and trends.
- The user base of API management platforms is changing. More developers, including AI engineers and agentic AI and automation developers, are using the platforms. Vendors

are revamping their marketing strategies and tactics to gain mind share among developer communities.

- As more customers use multiple API gateways, vendors have adopted and built new functionality to support distributed API management use cases.
- More vendors are offering consumption-based and value-based pricing models, as customers increasingly expect APIs to serve as the vehicle for providing repeatable, well-defined pricing.
- API consumption patterns are changing as AI becomes a leading API consumer, forcing a wave of new functionality to support agentic use of APIs, increased API call volumes, and heightened security and privacy risks. The rise of AI-based tools also has implications for internal features provided by API management vendors; in particular, it raises the bar for developer productivity and assistance tools.

What Customers Need to Know

Most vendors specialize in certain stages of the API life cycle. Few vendors excel at supporting every stage. For example, some vendors do not offer an API gateway, instead supporting integration of third-party gateways that customers must purchase separately. Buyers must pay closer attention to product details and assess their suitability for specific use cases.

API management vendors target their offerings to serve five customer segments, tailoring their products to one or more of the following:

- Organizations looking to develop AI capabilities and improve productivity and automation through agentic AI initiatives.
- Les organisations qui cherchent à développer des capacités fondamentales en abordant des initiatives liées à l'héritage, à la modernisation et à l'intégration.
- Les organisations qui cherchent à faire progresser leurs stratégies numériques et la commercialisation des API.
- Les organisations qui souhaitent utiliser les API pour construire des architectures cloud-native modernes impliquant des microservices, des maillages de services et des architectures événementielles.

- Les organisations qui cherchent à améliorer la gouvernance et la sécurité des API dans des environnements multicloud et multifournisseurs diversifiés.

Chaque segment de clientèle requiert des fonctionnalités de gestion d'API spécifiques, mais les fournisseurs ne communiquent pas toujours clairement ces distinctions. Avant d'évaluer les fournisseurs en détail, les clients doivent collaborer avec les parties prenantes de leur organisation afin de définir leurs cas d'usage particuliers. Ils pourront ensuite s'appuyer sur cette analyse et sur le document d'accompagnement « Capacités critiques pour la gestion des API » pour sélectionner l'offre de gestion d'API la plus adaptée.

⊕ Définitions des critères d'évaluation

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