AI Orchestration Market by Offering (Agent Orchestration Platforms, Model Serving Tools, Agent Builders, Data Orchestration Platforms), Deployment Model (SaaS, Air-gapped), Application (ITSM, Marketing Automation, Field Services) - Global Forecast to 2030

Market Report | 2025-10-13 | 526 pages | MarketsandMarkets

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Report description:

The global AI orchestration market size is projected to grow from USD 11.02 billion in 2025 to USD 30.23 billion by 2030, at a CAGR of 22.3%. Growth is being driven by the increasing need for a unified governance layer across applications, as organizations seek centralized approvals, lineage tracking, and policy enforcement that apply uniformly across IT and business workflows. Regulatory pressure is also adding momentum, with compliance frameworks in banking, healthcare, and the public sector driving buyers toward audit-ready orchestration layers that incorporate evidence, role-aware approvals, and rollback controls.

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These factors are turning AI orchestration into the central layer of enterprise automation strategies, bridging assistants, workflows, and legacy systems with transparent controls. Vendors that can combine fast time-to-value with governance, portable policies, and measurable ROI are expected to lead adoption as enterprises expand orchestrated actions across customer service, IT operations, security, finance, and supply chain use cases. The intricate nature of pricing structures and the division of budgets across functions are impeding enterprise-level commitments. Additionally, the potential for unintentional write-backs is constraining the autonomy of AI orchestration tools, which could hinder overall market expansion.

"Agent builder tools offering to witness breakout demand over the forecast period as enterprises scale from assist to safe, production-grade actions"

Agent builder tools are emerging as a standout growth engine within AI orchestration, enabling teams to move quickly without compromising data control. Business users can compose agents with prebuilt actions, while platform teams set typed inputs and outputs, approvals, and limits, ensuring that every write-back is traceable and reversible. Dividing responsibilities helps reduce build time and ensures consistent governance across various areas, including customer service, IT operations, finance, and supply chain management. Vendors are providing catalogs of ready-to-use actions for common tasks such as case updates, entitlement checks, data lookups, and change requests. Additionally, they offer evaluation kits to assist with testing plans and selecting tools before implementation.

Low-code and pro-code options run side by side, allowing a service owner to assemble a flow and an engineer to add secure connectors or custom actions without requiring rework. Pricing aligns with real usage, featuring a mix of builder seats and action consumption, which enables departments to start small and scale with confidence. As organizations expand from pilots to live, policy-bound automation, these tools act as the assembly line for new agents, feeding orchestrators with consistent telemetry and evidence. The result is a faster time to first value, cleaner audits, and a growing library of reusable agents that run across multi-tenant SaaS, single-tenant SaaS, or customer-managed cloud environments.

"BFSI end user leads AI orchestration adoption in 2025, driven by regulated workflows and measurable ROI"

Banking, financial services, and insurance (BFSI) represent the largest end-user segment in the AI orchestration market, reflecting the scale of operations and the intensity of regulatory oversight. Institutions are under pressure to streamline processes such as KYC updates, payment investigations, loan approvals, and claims handling while keeping every step auditable. Orchestration platforms provide the governance layer necessary to ensure that actions are bound by policy, approvals are enforced based on role, and evidence is logged for regulators and auditors. This helps banks and insurers reduce exception handling costs and expedite resolution times without compromising compliance. Vendors such as IBM, Palantir, and UiPath have already showcased BFSI case studies where orchestrated workflows reduced manual touchpoints, ensured audit readiness, and improved customer satisfaction scores.

Growth is reinforced by the high transaction volume and risk profile of BFSI operations, which makes orchestration's combination of speed and control especially attractive. For example, orchestrated agents can automatically flag anomalies, assemble evidence, and route approvals in payment flows, while ensuring that rollback is always possible. BFSI is expected to contribute the largest revenue share in 2025 and set the pace for adoption in other regulated industries, demonstrating that AI orchestration can deliver both efficiency and compliance at scale.

"North America will have the largest market share in 2025, and Asia Pacific is slated to grow at the fastest rate during the forecast period"

North America is set to capture the largest share of AI orchestration revenue in 2025, anchored by the US with additional momentum from Canada. Enterprises in the region are moving beyond pilots and are standardizing on an orchestration layer that can execute approved actions inside CRM, ERP, ITSM, and data platforms with full evidence. Demand is strongest in banking, healthcare, telecom, software, and public sector programs where audit trails, identity scopes, and clean rollback are non-negotiable. The region benefits from deep hyperscaler footprints and a dense network of global system integrators and boutique specialists that package certified connectors, industry playbooks, and managed services. Buyers also favor deployment choice.

Customer-managed and single-tenant options are commonly used for sensitive workloads, while multi-tenant SaaS supports rapid entry and departmental expansion. Procurement teams request unit economics dashboards, exportable run telemetry, and reference architectures that integrate with existing observability stacks. As organizations expand from assist use cases to governed write-backs and broaden coverage across service, operations, and finance, North America's large installed base and compliance intensity sustain leadership and drive multi-year, portfolio-level rollouts across Fortune 1000 accounts.

Meanwhile, Asia Pacific is expected to record the fastest growth through 2025-2030 as large, distributed enterprises push for efficiency and local regulators clarify rules for responsible AI. Telecom operators, manufacturers, banks, and public agencies in India, China, Japan, and South Korea are scaling programs that connect planning, tool execution, and approvals in one governed run. Growth is facilitated by rising cloud adoption, local data center build-outs, and the need to automate exception-heavy processes across shared-service hubs and field operations. Vendors are tailoring offers to regional needs with localized

connectors, language support, and deployment choices that include customer-managed cloud and on-premises runtimes for data residency and key control.
Partners in the region, including global system integrators, local consulting firms, and channel providers, are creating rapid-start kits for various use cases such as customer service automation, IT incident response, and handling non-conformance issues. These kits help organizations achieve quicker returns on investment. As companies assess improvements in cycle time, accuracy, and cost-to-serve, they are likely to shift their budgets from experimentation to expansion. This trend positions the Asia Pacific region as the most dynamic growth driver for AI orchestration in the coming years.

Breakdown of Primaries
In-depth interviews were conducted with chief executive officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the AI orchestration market.
-By Company: Tier I - 33%, Tier II - 44%, and Tier III - 23%
-By Designation: C-Level Executives - 36%, D-Level Executives - 41%, and others - 23%
-By Region: North America - 39%, Europe - 18%, Asia Pacific - 32%, Middle East & Africa - 4%, and Latin America - 7%
The report includes the study and in-depth company profiles of key players offering AI orchestration software and services. The major players in the AI orchestration market include IBM (US), AWS (US), Salesforce (US), Adobe (US), Microsoft (US), SAP (Germany), Google (US), Coforge (India), ServiceNow (US), UiPath (US), NVIDIA (US), LivePerson (US), Genesys (US), Palantir (US), Kore.ai (US), Altair (US), Yellow.ai (US), Glean (US), Digital.ai (US), Workato (US), Appian (US), Solace (Canada), Jitterbit (US), SnapLogic (US), Aisera (US), OneReach.ai (US), Domino Data Labs (US), Anyscale (US), Forethought.ai (US), Vue.ai (US), Rafay Systems (US), Spacelift.io (US), Airia (US), Dagster Labs (US), Humanitec (Germany), Tonkean (US), Akka.io (US), SparkBeyond (US), Union.ai (US), Orkes (US), Teneo.ai (Sweden), Orby AI (US), Multimodal.dev (US), and Hopsworks (Sweden).
Research Coverage
This research report categorizes the AI orchestration market by offering, orchestration architecture, deployment model, application, and end user. The offering segment is split into AI orchestration software and AI orchestration services. The software segment is further split into agent orchestration platforms, agent builder tools, workflow orchestration platforms, data orchestration platforms, model serving platforms, and infrastructure orchestration platforms. The services segment comprises managed services and professional services (training and consulting, system integration and implementation, and support and maintenance). The orchestration architecture segment includes centralized orchestration, decentralized orchestration, distributed orchestration, and hybrid orchestration. The deployment model segment spans single tenant SaaS, multi-tenant SaaS, customer managed cloud, and on premises & air gapped deployment.
Application segment covers customer service automation, sales & revenue automation, marketing automation, IT service management, security operations, finance & procurement automation, supply chain automation, HR & employee service desk, enterprise knowledge search, software engineering & coding automation, field service & asset operations, and other applications (legal operations & contract lifecycle, risk & internal audit, and research & lab workflows). The end user segment is split into BFSI, retail & CPG, professional service providers, healthcare & life sciences, telecommunications, software & technology providers, media & entertainment, logistics & transportation, government & defense, automotive, energy & utilities, manufacturing, and other enterprises (education, travel & hospitality, and construction & real estate). The regional analysis of the AI orchestration market covers North America, Europe, Asia Pacific, the Middle East & Africa (MEA), and Latin America.
The report's scope encompasses detailed information on the major factors, including drivers, restraints, challenges, and opportunities, that influence the growth of the AI orchestration market. A detailed analysis of key industry players has been conducted to provide insights into their business overview, solutions, and services, as well as key strategies, contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, and recent developments associated with the AI orchestration market. This report covers the competitive analysis of upcoming startups in the AI orchestration market ecosystem.
Key Benefits of Buying the Report
The report will provide market leaders and new entrants with information on the closest approximations of the revenue numbers for the overall AI orchestration market and its subsegments. It would help stakeholders understand the competitive landscape and

gain more insights to better position their business and plan suitable go-to-market strategies. It also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

Analysis of key drivers (enterprise shift from reactive chat to governed, outcome-linked automation; AI orchestration reducing cost-to-serve and time-to-resolution by executing system actions; need for a common governance layer across apps to centralize approvals, lineage, and policy enforcement; stringent focus on regulatory compliance pushing buyers toward governed AI orchestration), restraints (pricing complexity and cross-function budget splits stalling enterprise-wide commitments; risk of unintended write-backs limiting autonomy and efficiency of AI orchestration tools), opportunities (demand for sovereign and air-gapped AI orchestration in public sector and regulated industries; replacement of overlapping RPA, iPaaS, and workflow stacks with AI orchestration suites; prebuilt template libraries and certified action packs accelerating ROI cycles for mid-market), and challenges (enterprise app sprawl across multi-cloud environments causing vendor lock-in concerns; end-to-end observability across multi-agent orchestration remains complex)

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and new product & service launches in the AI orchestration market

Market Development: Comprehensive information about lucrative markets - analysis of the AI orchestration market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the AI orchestration market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of IBM (US), AWS (US), Salesforce (US), Adobe (US), Microsoft (US), SAP (Germany), Google (US), Coforge (India), ServiceNow (US), UiPath (US), NVIDIA (US), LivePerson (US), Genesys (US), Palantir (US), Kore.ai (US), Altair (US), Yellow.ai (US), Glean (US), Digital.ai (US), Workato (US), Appian (US), Solace (Canada), Jitterbit (US), SnapLogic (US), Aisera (US), OneReach.ai (US), Domino Data Labs (US), Anyscale (US), Forethought.ai (US), Vue.ai (US), Rafay Systems (US), Spacelift.io (US), Airia (US), Dagster Labs (US), Humanitec (Germany), Tonkean (US), Akka.io (US), SparkBeyond (US), Union.ai (US), Orkes (US), Teneo.ai (Sweden), Orby AI (US), Multimodal.dev (US), and Hopsworks (Sweden), among others, in the AI orchestration market. The report also helps stakeholders understand the pulse of the AI orchestration market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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