



# AI Brand Leader Report

AI Model Development Frameworks

[itbrandpulse.com](https://itbrandpulse.com)



# Executive Summary

This report presents the results of 238 votes from the AI developer community for Market Leader and Innovation Leader for AI Model Development Frameworks, 1 of 26 products in the AI Engineering stack covered by March 2026 AI Brand Leader surveys.

This was by far the most difficult product taxonomy we've ever built because the AI engineering market is moving so fast, it's highly fragmented, full of new names, conflicting definitions, and the offerings in the product categories often overlap with the capabilities of products in other categories.

We're confident the taxonomy we use next year will look very different.



We define AI Model Development Frameworks as software that enable developers to build, train, and deploy machine learning and deep learning models.

These frameworks provide core capabilities such as tensor computation, automatic differentiation, model definition, training workflows, and hardware acceleration, forming the foundational layer of the AI development stack.

The March 2026 IT Brand Pulse survey highlights TensorFlow as the market leader with 37.8% of votes, followed closely by PyTorch at 31.9%, indicating a competitive two-horse race at the top of the category.

PyTorch leads decisively in innovation with 45.0% of votes compared to TensorFlow's 29.8%. This divergence suggests that while TensorFlow retains strong production and enterprise credibility, PyTorch is increasingly viewed as the platform driving forward new development paradigms, particularly in research, flexibility, and ease of use.

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## What it means

Market leadership is not simply about size or revenue. In the AI world, it signals a brand's ability to set direction for the industry. A market leader defines categories, influences standards, attracts ecosystems, and becomes the default choice for buyers who want confidence and continuity.

## Why it matters

AI buyers, especially enterprise buyers, want stability as much as innovation. They want to know the product they invest in today will exist, grow, and be supported tomorrow. Market leaders create this assurance.

The AI compute, storage, and networking market is in relentless flux. Technology leaps, pricing shifts, and competitive plays happen at breakneck speed. Brand leadership whipsaws as yesterday's innovators become today's laggards, while new entrants seize fleeting advantages. Perceptions shift constantly, creating volatility in trust, adoption, and market dominance. In this environment, market leadership becomes a stabilizing force.

In AI infrastructure, brands like NVIDIA and Dell demonstrate this dynamic. When IT Brand Pulse surveys AI infrastructure professionals, these brands emerge as primary benefactors, leveraging scale, ecosystems, and innovation to capture mindshare, reinforce leadership, and amplify perceptions of enduring strength and trust.

Market leadership becomes a strategic moat, one that can outlast technological cycles. A strong market leader builds ecosystem gravity that attracts developers, partners, integrations, and corporate alliances. Developers learn CUDA; universities teach CUDA; startups build on CUDA. This ecosystem gravity makes market leadership self-reinforcing in ways that pure technical advantages cannot match.



## What it means

In AI, innovation is not optional. It's survival. Intelligence & innovation leadership represents a brand's ability to push boundaries, pioneer new capabilities, and deliver meaningful advancements before competitors. It's not about hype. It's about consistently releasing smarter models, introducing new techniques, improving performance, speed, and efficiency, challenging assumptions and solving previously unsolved problems

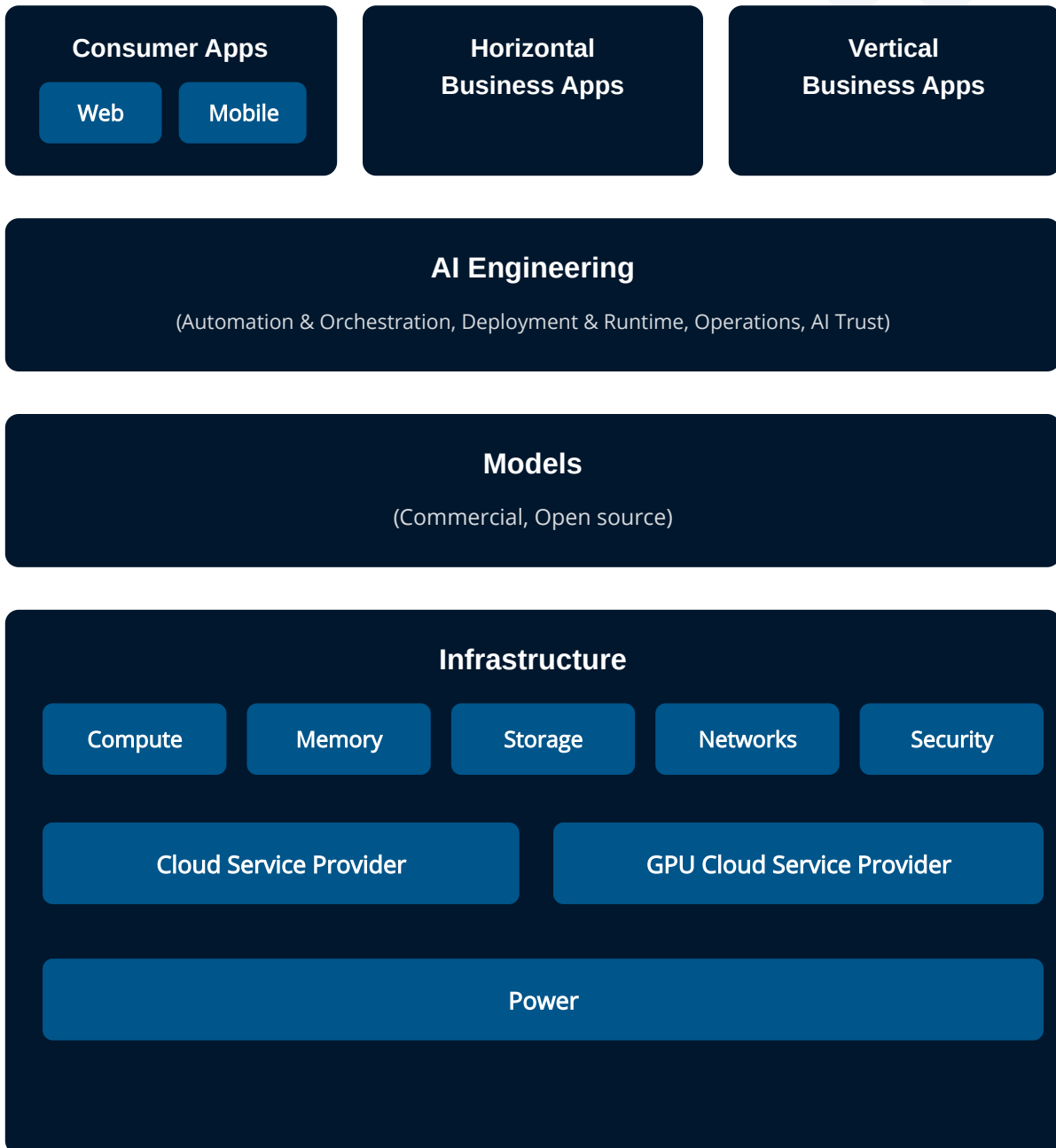
## Why it matters

AI companies are judged by their rate of progress. Buyers want assurance that a brand's solutions won't fall behind as models and hardware evolve. Innovation demonstrates vitality, proof that the brand is not static. Innovation leadership attracts top engineering talent, fuels investor confidence, inspires developers to build on the platform, signals that the brand is shaping the future, not reacting to it.

In a market where yesterday's breakthrough becomes today's baseline, intelligence leadership is one of the strongest predictors of long-term viability. The brands that win are those that make others react to them, not the other way around. Consider how quickly the landscape shifts: a model architecture that was revolutionary six months ago is now table stakes. Inference speeds that were impressive last quarter are now minimum requirements. In this environment, a brand's innovation velocity becomes a signal of its future relevance. Buyers aren't just evaluating what a brand can do today; they're evaluating whether it will still be leading tomorrow.

# AI Product Taxonomy

The AI Model Development Frameworks covered in this survey are part of the AI Engineering layer in the IT Brand Pulse AI Product Taxonomy. AI Brand Leader surveys are based on the product groupings below with shared characteristics, intended use, target customer, and other criteria.



# AI Engineering Stack

Below is the stack of 7 product categories and 26 sub-categories, including AI Model Development Frameworks, that makeup the AI Engineering layer in our AI Product Taxonomy.

## **Development**

- AI Model Development Frameworks
- Foundation Model Platforms
- LLMOps Platforms
- AI Agent Development Frameworks
- AI App Builder Platforms

## **Context & Memory**

- AI Context Engineering Platforms
- AI Memory Platforms
- Multimodal Memory Platforms
- Knowledge Graph Platforms
- Vector Databases

## **Data & Retrieval**

- Feature Stores
- Synthetic Data Platforms
- Data Labeling Platforms

## **Automation & Orchestration**

- AI Workflow Automation Platforms
- Agent Orchestration Platforms
- AI Integration Platforms
- Deployment & Runtime
- Model Serving Platforms
- AI Inference Optimization Platforms
- AI Application Platforms

## **Operations**

- AI Observability Platforms
- AI Evaluation Platforms
- Experiment Tracking Platforms
- Model Registry Platforms

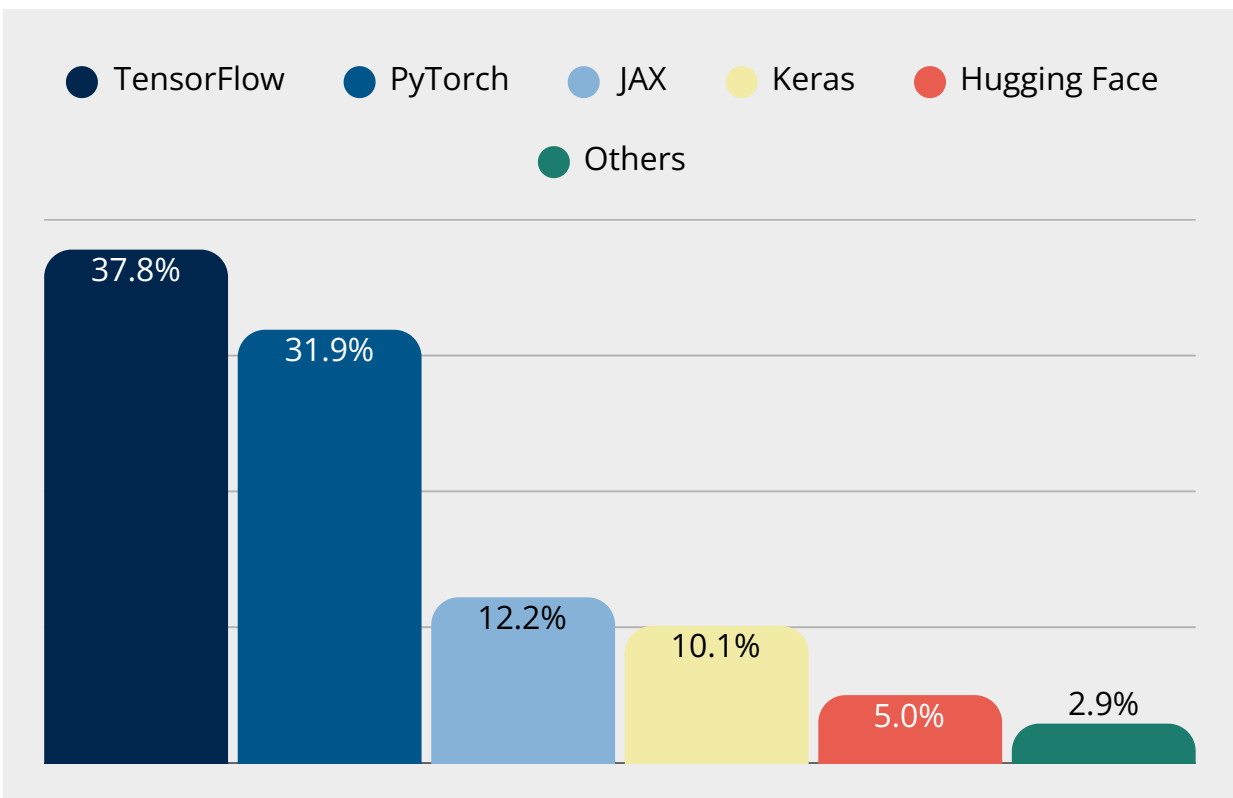
## **AI Trust**

- AI Governance Platforms
- AI Security Platforms
- AI Guardrails Platforms

# AI Development Frameworks



The AI dev community voted TensorFlow as the Market Leader for AI Model Development Frameworks, with 37.8% of votes, followed by PyTorch at 31.9%. The 6-point gap is a narrow lead rather than a dominant position, pointing to a highly competitive top tier. At the same time, nearly 30% of the vote is distributed across other frameworks, indicating meaningful adoption across multiple alternatives.

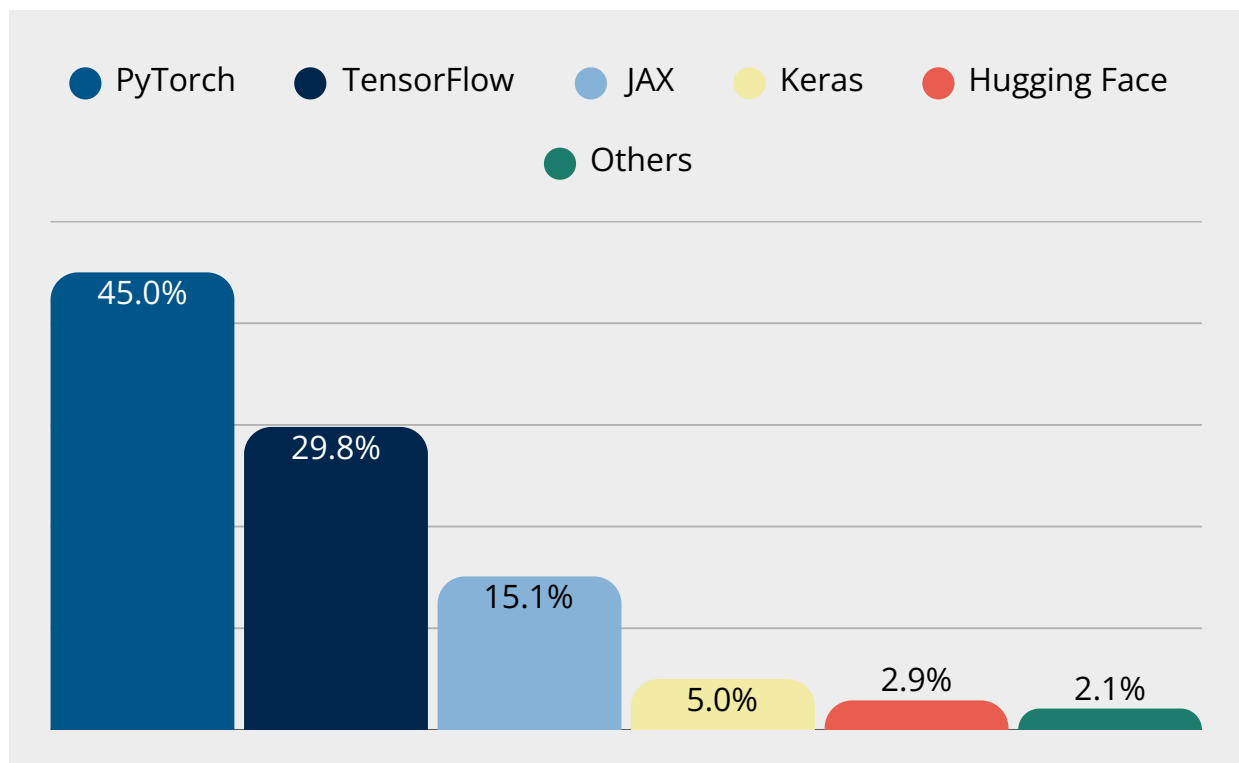


TensorFlow's lead reflects its early entry into the market and deep enterprise adoption, as well as its integration across the broader Google ecosystem, including tools for production deployment, scaling, and hardware acceleration. However, the relatively close position of PyTorch highlights a shift in developer preference toward greater flexibility and ease of use.

# AI Development Frameworks



PyTorch was voted Innovation Leader in AI Model Development Frameworks with 45.0% of votes, well ahead of TensorFlow at 29.8%. The 15-point spread is notably larger than in the market leader results, indicating a more decisive perception of innovation leadership. The survey indicates developers see PyTorch as the framework actively shaping the future direction of AI model development, particularly in areas tied to modern AI workloads and research-driven advancements.



PyTorch's innovation leadership is closely tied to its flexibility, developer-first design, and strong alignment with cutting-edge AI research. Its dynamic computation graph, ease of experimentation, and tight integration with popular libraries and tooling have made it the preferred framework for rapidly developing and iterating on new model architectures, especially in areas like generative AI and large-scale deep learning.

# Looking Forward



## Predictions

Major shifts in the AI landscape will materially change both how IT Brand Pulse structures the AI Engineering taxonomy and how brand leadership is measured, as the boundaries between frameworks, runtimes, and full-stack platforms continue to blur.

### **1. The taxonomy will evolve from frameworks to AI development and runtime layers**

The current taxonomy centered on “model development frameworks” will become too narrow as these technologies expand beyond training libraries into end-to-end development and execution environments. In response, the taxonomy will shift toward lifecycle layers such as: Build (model creation and training), Run (inference and agent execution), Scale (distributed training and infrastructure), and Optimize (performance tuning and automation). A new top-level category such as “AI Development Platforms” or “AI Runtime Platforms” will be needed.

### **2. Brand leader voting will shift from “preferred framework” to “primary development environment”**

Today, voting reflects which framework developers prefer for building models. Going forward, leadership will be defined by which platform becomes the default environment for developing, training, and running AI systems. This will drive a stronger concentration of votes among a smaller number of vendors at the top of the category. Survey questions will need to evolve from “which framework do you use?” to “which platform do you rely on as your primary AI development environment?”. Additionally, IT Brand Pulse will need to track cross-layer leadership signals, such as vendors that lead in model development, training infrastructure, and runtime execution simultaneously.



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## AI Brand Leader Program

IT Brand Pulse Brand Leader Awards are voted by thousands of IT professionals, not algorithms or small judging panels. Our surveys measure brand perception across the Five Pillars of AI brand leadership, giving winners credible, third-party validation that resonates with customers, analysts, and investors.

**See the latest survey results at:**

<https://itbrandpulse.com/brand-leader-program>.

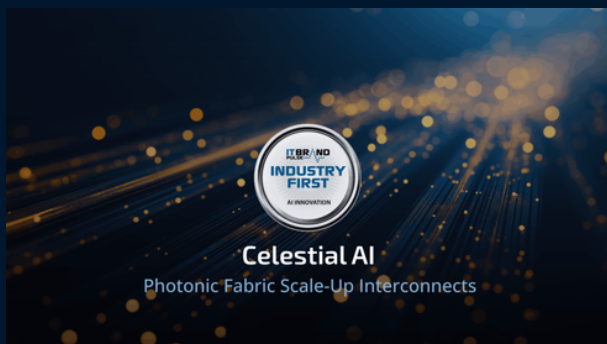




## Industry First Program

IT Brand Pulse's Industry First Program provides independent, third-party validation that you were first to deliver a meaningful AI innovation. Our analysts verify your timeline, technical claims, and market precedence, then publish a comprehensive validation article documenting your achievement.

See the latest industry firsts and nominate your product at: [itbrandpulse.com/industry-first](https://itbrandpulse.com/industry-first).



**Celestial AI**

Photonic Fabric Scale-Up Interconnects



**XConn**

Hybrid PCIe/CXL Switches



**Deep Frame**

Photorealistic Feature Film



**Cerebras AI**

1-Trillion Transistor AI Accelerator

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