



MARKET REPORT

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# Vibe coding index

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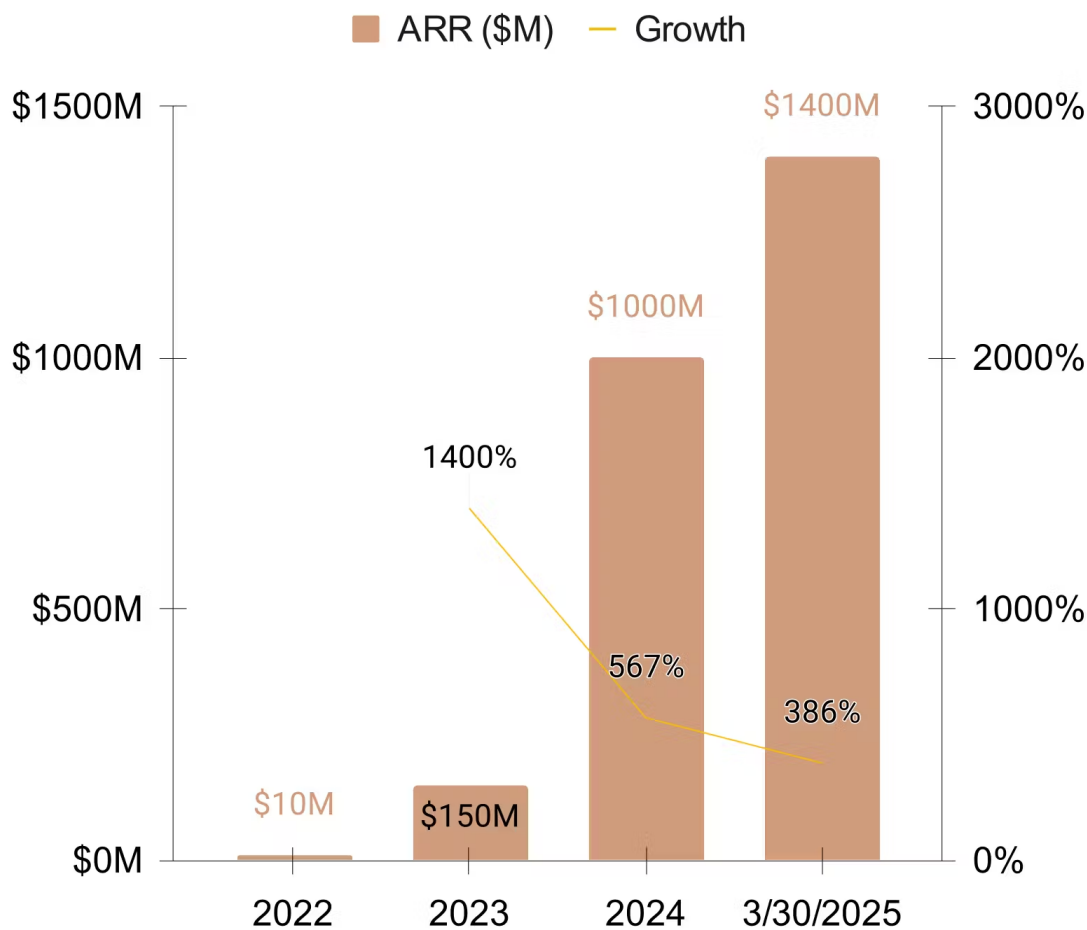
# Vibe coding index

By Jan-Erik Asplund

TL;DR: Anthropic's Claude has emerged as the backbone of the “vibe coding” trend, driving the growth of AI IDEs and app builders like Cursor (\$100M ARR) and Bolt.new (\$40M ARR) as well as underlying components like Supabase. The launch of Claude 3.7 Sonnet and Claude Code has accelerated this trend, with Sacra estimating that Anthropic hit \$1.4B ARR in March, growing 12% CMGR3. For more, check out our full report and dataset on Anthropic.



## ANTHROPIC Annual recurring revenue (ARR)



Key points via Sacra AI:

- “Vibe coding” has trended exponentially in 2025, with coders and non-coders alike designing & launching.

**software demos and experiences in hours using natural language, threatening to bypass specialized design & prototyping tools like Figma, Miro and Adobe XD.** A wave of products has sprung up around this pattern, including AI app builders like Lovable (\$17M ARR), Bolt.new (\$40M ARR) and Vercel's v0, and AI-powered IDEs like Cursor (\$100M ARR) and Codeium's Windsurf (\$40M ARR), that write code, spin up databases, and integrate with third-party APIs to build fully-functional applications.

- **With its SOTA multi-file editing capabilities, Anthropic's Claude is the backbone of the vibe coding ecosystem—the most-used model in Cursor, and the system default in Vercel's v0 and Replit Agent—driving Anthropic's reacceleration in 2025 to \$1.4B ARR as of March, growing 12% CMGR3, up from 8% in December.** With the launch of the semi-autonomous coding agent Claude Code in late February, Anthropic is now both competing with and powering tools like Cursor (\$20/month) and Windsurf (\$10/month) with the upside of driving more consumption through a usage-based pricing model that can cost \$6-100/hour depending on codebase size.
- **Indexed on the rise of vibe coding and becoming entrenched default, interoperable components—Supabase (database), Vercel (deployment), Stripe (payments), Resend (email), Clerk (authentication), and Docker (containers)—that are API-centric and easy to plug into any product to serve the features that every app needs.** With generous free tiers, GUIs or other no-code interaction modes, and prolific documentation that's been online since before the LLM pre-training cut-off date (roughly August 2023 to April 2024), these components have the potential to cement their positions via native integrations with AI app builders, like v0's auto-deploy to Vercel or Bolt.new's one-click Supabase setup.

For more, check out this other research from our platform:

- [Cursor \(dataset\)](#)
- [Cursor at \\$100M ARR](#)
- [Lovable vs Bolt.new vs Cursor](#)
- [Lovable \(dataset\)](#)
- [Bolt.new \(dataset\)](#)
- [Anthropic \(dataset\)](#)



- OpenAI (dataset)
- Scale (dataset)
- Edo Liberty, founder and CEO of Pinecone, on the companies indexed on OpenAI
- Will Bryk, CEO of Exa, on building search for AI agents
- AI talking heads growing 1024%
- Kyle Corbitt, CEO of OpenPipe, on the future of fine-tuning LLMs
- How AI is transforming productivity apps
- AI and the future of video