

AI Security Market Sizing Brief

TAM • SAM • SOM analysis with projections through 2030 • Q1 2026

EXECUTIVE SUMMARY

The AI security market represents a \$32B total addressable opportunity by 2030, growing at a 35% CAGR. Driven by regulatory mandates, enterprise AI adoption, and evolving threat landscapes, this market is transitioning from early-stage fragmentation to rapid category definition. This brief provides a structured TAM/SAM/SOM framework for investment thesis development.

MARKET SIZING FRAMEWORK



TAM \$32B Total Addressable Market

Total AI security spend globally by 2030. Includes all security tools, platforms, and services addressing AI-specific risks across all geographies and enterprise sizes.

SAM \$14.2B Serviceable Addressable Market

Enterprise-grade solutions in North America and EU markets. Excludes consumer, SMB-only, and emerging markets where go-to-market is capital-intensive.

SOM \$4.8B Serviceable Obtainable Market

Addressable by specialized AI security vendors. Excludes adjacent cybersecurity and general cloud security platform overlap. Pure-play opportunity.

GROWTH PROJECTIONS

YEAR	TAM	SAM	SOM	KEY DRIVER
2024	\$8.5B	\$3.8B	\$1.3B	Foundation models scale enterprise adoption
2025	\$12.1B	\$5.4B	\$1.9B	EU AI Act enforcement begins
2026P	\$16.8B	\$7.5B	\$2.6B	Enterprise security budget reallocation
2027P	\$21.2B	\$9.4B	\$3.3B	M&A consolidation wave
2028P	\$25.1B	\$11.2B	\$3.9B	Platform standardization
2030P	\$32.0B	\$14.2B	\$4.8B	Market maturity — category leaders emerge

BASE CASE CAGR: 35% • CONSERVATIVE: 28% • AGGRESSIVE: 42%

Category-Level Sizing

Funding, growth rates, and market share by security category

BY CATEGORY

CATEGORY	VENDORS	2025 TAM	2030P TAM	CAGR	SHARE
Data Security & Privacy	42	\$2.8B	\$7.2B	34%	22.5%
AI Governance & Compliance	38	\$2.0B	\$5.4B	37%	16.9%
Threat Detection & Response	35	\$2.4B	\$5.8B	32%	18.1%
Identity & Access for AI	28	\$1.3B	\$3.6B	36%	11.3%
Supply Chain & Model Security	22	\$0.9B	\$2.8B	42%	8.8%
Red Teaming & Adversarial	18	\$0.6B	\$2.4B	52%	7.5%
Infrastructure & Runtime	16	\$0.7B	\$1.9B	35%	5.9%
Content Safety & Guardrails	14	\$0.5B	\$1.4B	38%	4.4%
Security Posture Management	12	\$0.5B	\$1.0B	26%	3.1%
Secure Development & MLOps	10	\$0.4B	\$0.5B	8%	1.6%
TOTAL	235	\$12.1B	\$32.0B	35%	100%

METHODOLOGY

Data Sources

SEC filings, Crunchbase, PitchBook, vendor disclosures, and primary research across 200+ companies.

TAM Derivation

Bottom-up aggregation of category-level spending estimates combined with top-down validation against Gartner and IDC market models.

Growth Assumptions

Base case: 35% CAGR (2024-2030). Conservative: 28%. Aggressive: 42%. Regulatory catalysts modeled as step-functions.

SOM Criteria

Specialized AI security vendors only. Excludes adjacent cybersecurity and general cloud security platform overlap.

This brief is for informational purposes only and does not constitute investment advice. Market projections are estimates based on available data and may differ from actual outcomes. All figures are denominated in USD.