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Global AI Software Bill of Materials Platforms Market Growth (Status and Outlook) 2026-2032

https://marketpublishers.com/r/GAB67E79B43AEN.html
Date: October 2026
Pages: 100
Price: US$ 3,660.00 (Single User License)
ID: GAB67E79B43AEN

Abstracts

The global AI Software Bill of Materials Platforms market size is predicted to grow from US$ 66.52 million in 2025 to US$ 919 million in 2032; it is expected to grow at a CAGR of 42.5% from 2026 to 2032.

AI Software Bill of Materials Platforms are software platforms and tools that discover, generate, maintain, and export structured inventories of the AI-specific components embedded in or connected to software systems. The research scope covers products that identify items such as foundation and fine-tuned models, datasets, prompts, agents, MCP servers, AI SDKs and frameworks, external model services, and their provenance or dependency relationships, then convert that inventory into auditable AI-BOM records for security, governance, compliance, procurement, and incident response. Typical products operate through repository and source-code scanning, artifact or container analysis, cloud and runtime discovery, or combinations of these methods, and increasingly support machine-readable formats such as CycloneDX AI/ML-BOM and SPDX AI profiles. Commercial offerings may be delivered as dedicated AI-BOM software or as modules within AI security, application security, software supply chain security, and governance platforms. The blended gross margin is approximately 78%.

Market Trends

The market is moving from static model inventories toward continuously updated AI supply-chain records linked to source repositories, CI/CD pipelines, containers, cloud environments and runtime systems. Buyers increasingly expect the same inventory to cover models, datasets, prompts, agents, MCP servers, frameworks and external AI services rather than only model names. Standards support is becoming a purchasing criterion as security, GRC and procurement teams want machine-readable records that

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can move into existing SBOM, vulnerability-management and audit workflows. Integrated discovery, provenance, policy enforcement and evidence export are therefore replacing spreadsheet-based inventories and isolated scanners.

Drivers

Enterprise adoption is being driven by the rapid spread of third-party models, open-source AI components and agentic architectures, which creates a visibility gap that conventional SBOM and SCA tools do not fully address. Security reviews, supplier due diligence, internal AI governance and regulatory documentation requirements are increasing demand for a continuously maintained record of what AI is used, where it is used and how components are connected.

Restraints

The market remains constrained by an immature taxonomy, inconsistent disclosure of training-data and model provenance, and limited standardization across AI asset types. Many AI services expose only partial metadata, while proprietary model APIs can change without transparent versioning. Buyers also face overlap between AI-BOM, AI asset inventory, AI security posture management and existing SBOM products, making product boundaries and budget ownership less clear.

Opportunities

The strongest opportunity lies in turning AI-BOM from a reporting artifact into an operational control layer. Platforms that continuously detect shadow AI, map agents to models and tools, track model and dataset lineage, enforce approved-component policies, and feed security or GRC workflows can expand beyond compliance budgets into application security and enterprise AI governance. Multi-repository, cloud and runtime discovery will be particularly important as AI systems become more distributed.

Challenges

Long-term challenges include keeping inventories current as models, prompts and agent tools change faster than traditional software dependencies, proving provenance for externally hosted models and datasets, and avoiding high false-positive rates in code-based discovery. Vendors must also support changing AI transparency standards without forcing customers into proprietary schemas, while demonstrating that inventory data leads to measurable risk reduction rather than additional reporting overhead.

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Value Chain Analysis

Upstream value comes from source-code repositories, model hubs, package registries, container registries, cloud APIs, CI/CD systems and emerging AI transparency standards that provide component metadata. AI-BOM vendors normalize these signals, resolve identities and relationships, enrich them with provenance, license and risk context, and maintain a searchable inventory or dependency graph. Downstream value is realized when security, engineering, GRC, procurement and audit teams use the same inventory for policy enforcement, supplier review, incident scoping and compliance evidence. Software gross margins are structurally high, but sustained value depends on the breadth and freshness of integrations, proprietary discovery intelligence and enterprise workflow depth.

Segment Insights

Commercial demand is currently concentrated in integrated AI security, AppSec and software supply-chain platforms because large enterprises prefer to add AI inventory to tools already connected to their development environment. Dedicated AI-BOM products and open-source scanners are important for early adoption, standards experimentation and developer-led discovery, while integrated modules have an advantage where customers need policy control, audit trails and cross-application visibility. Multi-surface discovery is becoming more valuable than repository-only scanning as organizations seek to reconcile what is declared in code with what is actually deployed.

Downstream Market Opportunities

The most attractive downstream opportunities are in software and internet companies, financial services, healthcare, government and defense, and industrial or automotive enterprises that are embedding third-party AI into production systems. These customers have large software estates, formal supplier controls and stronger documentation requirements, making a continuously maintained AI-BOM useful for both security and governance. Broader adoption should follow as AI agents and external model services become common components of ordinary enterprise applications.

Regional Insights

North America is the leading early commercial market because of its concentration of AI software vendors, large enterprise security budgets and established SBOM procurement practices. Europe is a major expansion market as AI transparency and

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technical-documentation requirements increase the value of auditable component inventories. Asia-Pacific demand is developing through technology, financial services and manufacturing organizations, with adoption likely to favor platforms that can support hybrid environments and local governance requirements.

Competitive Landscape Analysis

Competition is forming between established AppSec and software supply-chain vendors that are extending existing SBOM, SCA and governance platforms into AI, and AI-native security startups that begin with model, agent and runtime discovery. Larger platform vendors benefit from installed developer integrations, enterprise procurement relationships and existing policy engines, while specialist vendors can move faster on new AI asset types such as MCP servers, agent graphs and runtime-connected tools. Product differentiation is increasingly based on discovery coverage, deterministic accuracy, standards-based export, lineage depth, policy automation and the ability to maintain a live inventory across development and production rather than on simple AI-BOM file generation.

Report Scope

LPI (LP Information)' newest research report, the “AI Software Bill of Materials Platforms Industry Forecast” looks at past sales and reviews total world AI Software Bill of Materials Platforms sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Software Bill of Materials Platforms sales for 2026 through 2032. With AI Software Bill of Materials Platforms sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world AI Software Bill of Materials Platforms industry.

This Insight Report provides a comprehensive analysis of the global AI Software Bill of Materials Platforms landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on AI Software Bill of Materials Platforms portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global AI Software Bill of Materials Platforms market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Software Bill of Materials Platforms and breaks down

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the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI Software Bill of Materials Platforms.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Software Bill of Materials Platforms market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Dedicated AI-BOM Platforms

AI Security Platform Modules

AppSec and Supply Chain Modules

Open-Source AI-BOM Tools

Segmentation by Deployment Mode:

Cloud-Based

On-Premises

Hybrid

Segmentation by Discovery Scope:

Repository and Source Code

Artifact and Container

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Cloud and Runtime

Multi-Surface

Segmentation by Output Standard:

CycloneDX-Native

SPDX-Native

Multi-Standard

Proprietary or Other

Segmentation by Application:

IT and Software

Financial Services

Healthcare

Government and Defense

Automotive and Manufacturing

Others

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel

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Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Cisco

Checkmarx

Snyk

Mend.io

Sonatype

Cycode

OX Security

Legit Security

Repello AI

ZeroPath

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