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Shadow AI Risk & Governance Market by Solution (Shadow AI Discovery & Visibility, AI Governance & Policy Management, AI Data Protection & Security Controls, AI Access & Agent Governance), Service (Professional, Managed) - Global Forecast to 2032

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Abstracts

The shadow AI risk & governance market is projected to grow from USD 1.39 billion in 2026 to USD 8.64 billion by 2032, at a CAGR of 35.6% during the forecast period. A major shift in the market is the expansion of AI beyond standalone applications into enterprise SaaS, developer tools, cloud platforms, open-weight models, and third-party software. The Cloud Security Alliance identifies embedded AI within already-approved enterprise applications as a distinct shadow AI exposure, as organizations may begin using newly introduced AI capabilities without reassessing the underlying security and governance implications. HiddenLayer's 2026 research similarly found that 78% of organizations consider embedded third-party AI models business-critical, while 93% use open-weight models from public repositories. These developments are creating demand for controls that extend beyond application discovery to AI component assessment, third-party AI governance, model provenance, data usage controls, and continuous security monitoring.

"By solutions, the AI access & agent governance segment is expected to witness the highest CAGR during the forecast period."

The AI access & agent governance segment is expanding as AI systems increasingly interact with enterprise applications, APIs, data repositories, and other AI systems. Governance requirements are consequently shifting toward authorization of AI actions,

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machine identities, tool permissions, delegation limits, and context-aware controls. A 2026 Cloud Security Alliance survey found that 82% of enterprises had discovered previously unknown AI agents, with 41% reporting that this occurred multiple times. The same research found that action risk and human authorization were among the primary signals organizations use to govern agent behavior, while 79% expect context-aware controls to become important over the next two years. This is creating demand for controls that govern what AI systems are permitted to access and execute rather than simply monitoring their presence.

"By organization size, the large enterprises segment is projected to hold the largest market share in 2026."

The large enterprises segment is projected to account for the largest share of the shadow AI risk & governance market, reflecting the increasing complexity of AI environments across large organizations. Enterprises are no longer managing only centrally deployed AI applications; their environments increasingly include embedded AI functionality, open-weight models, developer-created workflows, third-party AI services, and autonomous agents. This creates governance requirements spanning procurement, security assessment, data access, model provenance, ownership, permissions, and lifecycle controls. HiddenLayer reports that 88% of organizations consider most or all internally operated AI models critical to business success, while 78% also consider embedded third-party models business-critical. The increasing business dependency on these AI components is creating stronger requirements for centralized risk management and enterprise-wide controls.

Breakdown of Primaries

The study draws insights from a range of industry experts, including component suppliers, Tier 1 companies, and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 - 40%, Tier 2 - 35%, Tier 3 - 25%

By Designation: C-level Executives - 50%, Managers and Other Levels - 50%

By Region: North America - 30%, Europe - 20%, Asia Pacific - 35%, Middle East & Africa - 10%, Latin America - 5%

Major vendors in the shadow AI risk & governance market include IBM (US), Microsoft

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(US), Palo Alto Networks (US), Zscaler (US), Netskope (US), Cisco (US), ServiceNow (US), OneTrust (US), Forcepoint (US), Proofpoint (US), Credo AI (US), Holistic AI (UK), NeuralTrust (Spain), ModelOp (US), Relyance AI (US), Airia (US), Zenity (US), HiddenLayer (US), Check Point (Israel), and Noma Security (Israel).

The study includes an in-depth competitive analysis of the key players in the shadow AI risk & governance market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the shadow AI risk & governance market based on offering (solutions, services), solution type (shadow AI discovery & visibility, AI governance & policy management, AI data protection & security controls, AI risk & compliance management, AI access & agent governance), services (professional services, managed services), deployment (cloud, on-premises), organization size (large enterprises, SMEs), vertical (BFSI, government & defense, healthcare & life sciences, retail & ecommerce, IT & telecommunications, media & entertainment, transportation & logistics, energy & utilities, manufacturing, other verticals), and region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America). The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report will help market leaders/new entrants with information on the closest approximations of revenue numbers for the overall shadow AI risk & governance market and its subsegments. This report will help stakeholders understand the competitive landscape and gain valuable insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers

Analysis of critical drivers (growing gap between AI usage and enterprise oversight, increasing organizational focus on AI accountability and risk ownership), restraints (fragmented AI environments hinder centralized governance, shortage of skilled AI governance and security professionals),

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opportunities (rising adoption of AI agents creates demand for access and agent governance, integration of AI governance with existing security and data protection platforms), and challenges (limited visibility into unauthorized AI usage, balancing AI controls with business productivity)

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, new products, and service launches in the shadow AI risk & governance market

Market Development: Comprehensive information about lucrative markets – the report analyses the shadow AI risk & governance market across varied regions

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, such as IBM (US), Microsoft (US), Palo Alto Networks (US), ServiceNow (US), Cisco (US), Airia (US), NeuralTrust (Spain), and Zenity (US), among others, in the shadow AI risk & governance market among others, in the shadow AI risk & governance market strategies

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