

New market, or new label?

We examined 106 companies that say they protect data used by AI, and charted 56 with a documented control.

38 of 49

**ACTIVE VENDORS WERE BUILT BEFORE GENAI
OR ARE BROAD SECURITY PLATFORMS**

22 of 26 older data security specialists now lead their homepage with AI.

10 FOUNDED 2022 OR LATER · 1 UNKNOWN · SWIPE FOR THE MAP →

Four categories, sorted by where the control sits

AI Usage Control · 23

Aurascape, Broadcom (Symantec), Check Point, Cisco, Cloudflare and 15 more

AI Data Security Platforms · 13

Bedrock Data, BigID, Concentric AI, Cyberhaven, Cyera and 5 more

Data Protection for AI Apps · 12

AliasPath, AWS, CipherStash, CyborgDB, Google Cloud and 7 more

AI Data Access Control · 8

Credal, Hardshell, Immuta, Opsin Security, Permit.io and 2 more

56 CHARTED, INCLUDING 7 ACQUIRED · 37 ADJACENT · FULL MAP IN THE PDF

Who else is buying data security startups?

(Hint: check your backup vendor.)

8/20

DATA SECURITY TARGETS
BOUGHT BY DATA
OWNERS

15/17

AI SECURITY TARGETS
BOUGHT BY SECURITY
VENDORS

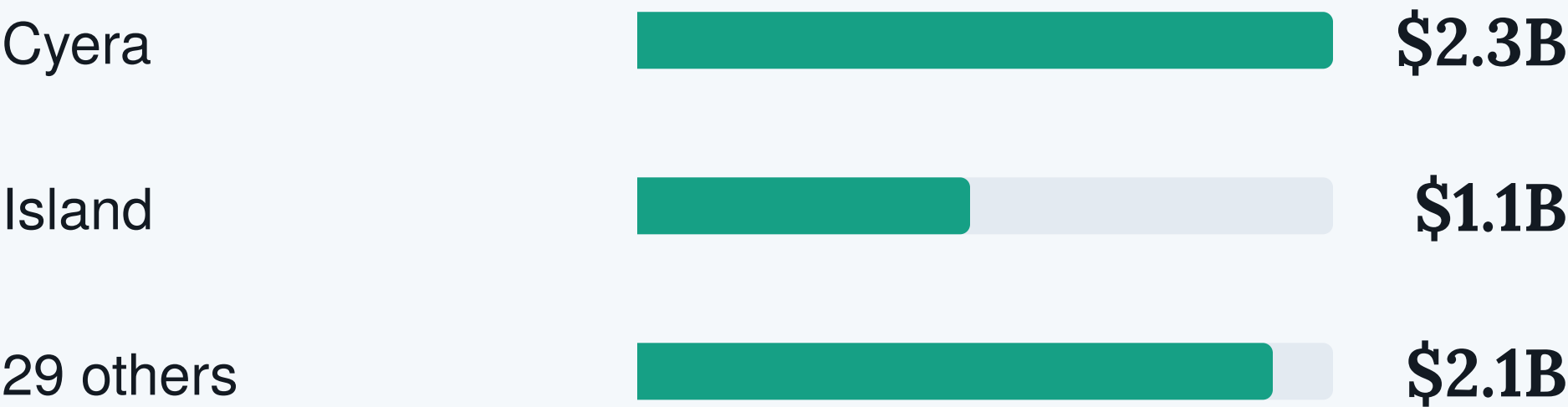
Veeam bought Securiti. Rubrik bought Laminar. Databricks bought Antimatter. The biggest deal still went to a security vendor: Proofpoint's pending \$6.3B offer for Varonis.

N = 37 DEALS ANNOUNCED 2023 TO OCT 2026, INCLUDING 2 PENDING

Two companies hold most of the money

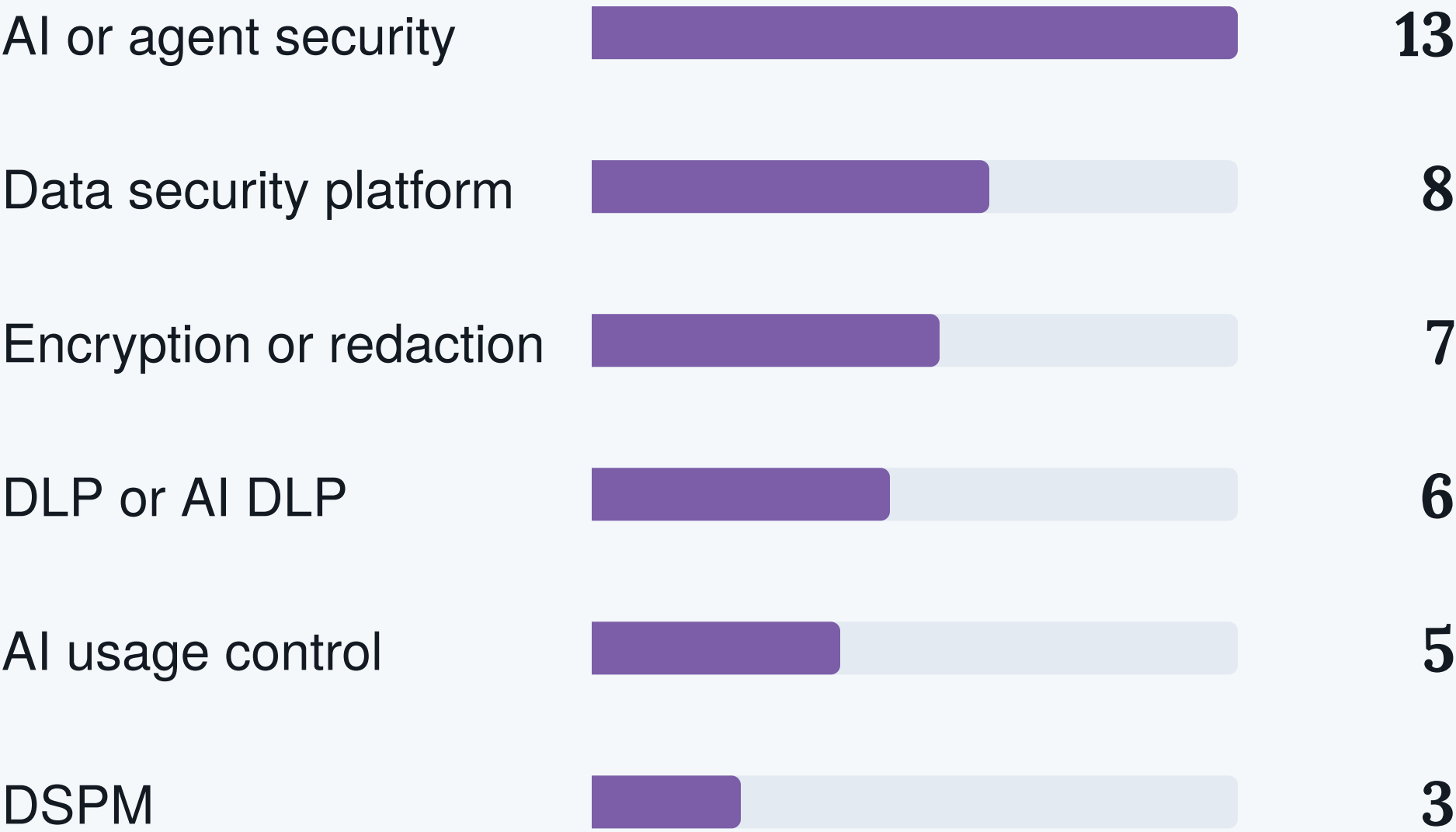
62%

OF \$5.5B DISCLOSED VENTURE FUNDING WENT TO CYERA AND ISLAND



WHOLE-COMPANY FUNDING, NOT AI-SPECIFIC · N = 31 OF 49 ACTIVE VENDORS · 18 PUBLIC OR UNDISCLOSED

44 names for one market. Which one goes in your RFP?



Ask which data each product protects, where it enforces and what it blocks. The labels will not tell you.

N = 50 CHARTED VENDORS · 6 NOT CAPTURED · LABELS GROUPED BY FAMILY

Only 10% publish a real price

5

publish a price

11

name a rival on
a comparison
page

16

mention
Microsoft 365
Copilot

The five that publish a price: QueryPie, CipherStash, CyborgDB, Google Cloud and Very Good Security.

N = 50 CHARTED VENDORS · 6 NOT CAPTURED

Did we miss a company, or put one in the wrong place?

106 companies examined, 56 charted. Some we will have missed.

The full three-page map, the agent controls review and the buyer evidence map are in the PDF.

New market, or new label? Tell me which side your stack is on.