

Quantum Computing Market - A Global and Regional Analysis: Focus on Application, Product, and Country-Level Analysis - Analysis and Forecast, 2026-2035

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Abstracts

The quantum computing market is projected to grow from \$1,934.9 million in 2026 to \$21,869.6 million by 2035, at a CAGR of 30.92%. The growth has been driven by increasing investments in quantum research and development, rising adoption of quantum technologies across industries such as healthcare, pharmaceuticals, financial services, aerospace and defense, energy, and logistics, along with the growing demand for high-performance computing solutions capable of solving complex computational problems beyond the capabilities of classical systems. As organizations increasingly explore quantum computing for optimization, simulation, cryptography, and machine learning applications, the demand for advanced quantum hardware, software, and cloud-based quantum services continues to expand.

The integration of artificial intelligence, machine learning, cloud computing, and hybrid quantum-classical architectures is significantly enhancing the practical applicability and accessibility of quantum computing, further accelerating market growth. Advancements in quantum processors, quantum error correction, superconducting qubits, trapped-ion technologies, photonic quantum systems, and quantum software development platforms are also strengthening the capabilities of quantum computing ecosystems. Furthermore, supportive government initiatives, increasing public and private investments, expanding partnerships between technology companies, research institutions, and enterprises, and growing emphasis on scientific discovery, optimization, and cybersecurity are contributing to the continued development of the quantum computing market.

However, the quantum computing market faces challenges such as high development and deployment costs, technological complexity, scalability limitations, and concerns related to quantum error rates and system stability. Advanced quantum technologies

provide significant computational advantages for specific applications, but the substantial infrastructure requirements, shortage of skilled professionals, and long commercialization timelines can limit widespread adoption. Additionally, challenges associated with hardware scalability, algorithm development, integration with existing IT infrastructures, and the need for robust quantum error correction continue to increase operational complexity for technology providers and end users.

Despite these constraints, the competitive landscape remains dynamic, with companies focusing on continuous technological innovation, strategic collaborations with research organizations, government agencies, and enterprise customers, and the expansion of cloud-accessible quantum computing platforms. Market participants are also investing in advanced quantum software tools, hybrid computing frameworks, cybersecurity solutions, and industry-specific use cases to strengthen their competitive positioning. As demand for next-generation computing capabilities continues to grow, the quantum computing market is expected to witness sustained expansion, supported by increasing investments, ongoing technological advancements, and the growing need for computational solutions capable of addressing highly complex scientific and industrial challenges across diverse sectors.

Introduction to Quantum Computing Market

The study conducted by BIS Research identifies the quantum computing market as a critical enabler of next-generation computing, advanced analytics, and complex problem-solving capabilities across multiple industries. Quantum computing solutions play an essential role in addressing computational challenges that are difficult or impractical for classical computing systems, supporting applications such as optimization, cryptography, drug discovery, materials science, financial modeling, artificial intelligence, and supply chain management. As organizations increasingly explore quantum technologies to gain competitive advantages and accelerate innovation, the importance of scalable quantum hardware, software platforms, and cloud-based quantum services has grown significantly. These solutions help organizations improve computational efficiency, enhance predictive capabilities, accelerate research outcomes, and support faster and more accurate decision-making.

With advancements in quantum hardware architectures, quantum algorithms, artificial intelligence, machine learning, and cloud computing, the market is evolving toward more accessible and commercially viable quantum computing ecosystems capable of delivering practical business value. Innovations such as superconducting qubits, trapped-ion systems, photonic quantum computing, quantum error correction, hybrid

quantum-classical computing, and quantum-as-a-service (QaaS) platforms are strengthening the role of quantum computing across increasingly complex scientific, industrial, and commercial applications. In addition, the growing adoption of digital transformation initiatives, high-performance computing requirements, and data-intensive workloads is driving demand for scalable and application-specific quantum solutions capable of processing and analyzing highly complex datasets.

Furthermore, increasing investments from governments, technology providers, venture capital firms, and research institutions are accelerating advancements in quantum technologies and expanding commercialization opportunities. Strategic collaborations among quantum hardware developers, software providers, cloud service companies, academic institutions, and enterprise end users are fostering innovation and supporting the development of industry-specific use cases. As quantum computing technology continues to mature and organizations seek new approaches to solving computationally intensive problems, the quantum computing market is expected to witness strong growth, supported by ongoing technological advancements, increasing enterprise adoption, and expanding applications across diverse end-use sectors.

Market Introduction

The quantum computing market is becoming a foundational component of modern digital transformation and next-generation computing ecosystems, driven by the growing need for advanced computational capabilities, accelerated problem-solving, and data-driven decision-making across industries. As organizations increasingly seek solutions to address complex optimization, simulation, and analytical challenges beyond the capabilities of classical computing systems, quantum computing technologies are gaining traction across sectors such as healthcare, pharmaceuticals, financial services, energy, aerospace and defense, manufacturing, and logistics. Enterprises and government agencies are investing heavily in quantum research, infrastructure, and cloud-based quantum computing platforms, while technology providers are focusing on delivering scalable quantum hardware, software, and hybrid quantum-classical solutions capable of addressing highly complex computational workloads.

Rapid advancements in quantum hardware architectures, quantum algorithms, artificial intelligence, machine learning, and cloud computing are significantly enhancing the performance, accessibility, and commercial viability of quantum computing solutions. The market is also benefiting from increasing developments in superconducting qubits, trapped-ion systems, photonic quantum computing, neutral atom technologies, and quantum error correction techniques, which are improving computational accuracy,

scalability, and reliability. These innovations are particularly relevant in applications such as drug discovery, molecular modeling, financial risk analysis, cryptography, supply chain optimization, materials science, and artificial intelligence, where advanced computational capabilities can generate substantial operational and strategic advantages.

Furthermore, the growing availability of quantum computing through cloud-based access models is enabling broader adoption among enterprises, research institutions, and government organizations by reducing infrastructure barriers and accelerating experimentation. Increasing collaboration among technology companies, academic institutions, research laboratories, and public-sector organizations is fostering innovation and expanding the development of industry-specific quantum applications. With continued technological advancements, supportive government initiatives, expanding investment activities, and increasing enterprise awareness of quantum-enabled opportunities, the quantum computing market is expected to play a vital role in the future of high-performance computing, scientific discovery, cybersecurity, and intelligent decision-making across a wide range of industries.

Industrial Impact

The quantum computing market is exerting a significant industrial impact by transforming computational workflows, research processes, and decision-making capabilities across industries through unprecedented processing power, advanced optimization techniques, and accelerated problem-solving. As organizations increasingly explore quantum technologies for applications such as molecular simulation, financial modeling, cryptography, supply chain optimization, and artificial intelligence, quantum computing solutions are becoming essential for improving operational efficiency, reducing computational complexity, and enabling faster, more accurate insights across critical business functions. These platforms support the execution of highly complex calculations and simulations, helping enterprises optimize resource allocation, enhance innovation cycles, and improve strategic decision-making in data-intensive environments.

The integration of advanced technologies such as artificial intelligence, machine learning, cloud computing, high-performance computing (HPC), and hybrid quantum-classical architectures is driving demand for more sophisticated and commercially viable quantum computing solutions. These advancements are improving computational performance, expanding accessibility through cloud-based quantum platforms, enabling the development of advanced algorithms, and supporting breakthroughs in scientific

research and industrial optimization. Industries such as healthcare, pharmaceuticals, financial services, aerospace and defense, manufacturing, energy, and logistics are increasingly evaluating quantum technologies to address challenges that are difficult or impossible to solve using conventional computing approaches.

The market is fostering increased collaboration across the broader ecosystem, including quantum hardware developers, software providers, cloud service companies, research institutions, government agencies, and enterprise end users, as scalability, interoperability, error correction, and commercialization become increasingly important in delivering practical quantum computing solutions. Strategic partnerships and research collaborations are accelerating innovation, supporting the development of industry-specific applications, and strengthening the overall quantum computing value chain.

As enterprises and governments prioritize technological competitiveness, scientific advancement, cybersecurity preparedness, and computational innovation, the quantum computing market is expected to remain a critical enabler within the broader digital transformation landscape. The surrounding ecosystem is also evolving rapidly, supported by advancements in quantum hardware architectures, quantum networking, cloud-based quantum services, and quantum software development frameworks. This is reinforcing the position of quantum computing as an essential technology for enabling next-generation computing capabilities, accelerating scientific discovery, and driving intelligent, data-centric innovation across modern industries.

Market Segmentation:

Segmentation 1: by Application

Optimization

Simulation

Quantum Machine Learning

Others (Cryptography, Cybersecurity, etc.)

Optimization to Maintain Dominance in the Global Quantum Computing Market (by Application)

Optimization and computational acceleration remain dominant application areas in the global quantum computing market, driven by the growing need to solve highly complex problems faster and more efficiently than conventional computing systems. Quantum computing is increasingly being deployed across industries such as financial services, logistics, manufacturing, healthcare, energy, and aerospace to address challenges related to route optimization, portfolio management, supply chain planning, resource allocation, molecular simulation, and advanced data analytics. The integration of quantum algorithms, artificial intelligence, machine learning, and hybrid quantum-classical architectures enhances computational performance, supports faster decision-making, and improves operational efficiency.

Segmentation 2: by End-use Industry

Aerospace and Defense

BFSI

Healthcare

Automotive

Energy and Power

Chemical

Government

Others (Telecommunications, Academia and Research Institutions, etc.)

BFSI to Maintain Dominance in the Global Quantum Computing Market (by End-Use Industry)

The banking, financial services, and insurance (BFSI) sector plays a pivotal role in maintaining dominance within the global quantum computing market, driven by the growing need for advanced computational capabilities, risk management, portfolio optimization, and cybersecurity solutions. Quantum computing is increasingly being explored by financial institutions to solve complex optimization problems, accelerate

financial modeling, enhance fraud detection, improve algorithmic trading strategies, and strengthen cryptographic security frameworks. The ability of quantum systems to process large and complex datasets significantly faster than conventional computing technologies enables financial organizations to improve decision-making accuracy and operational efficiency.

Segmentation 3: by Offering

Hardware

Software

Services

Services to Maintain Dominance in the Global Quantum Computing Market (by Offering)

Services remain a core offering driving dominance in the global quantum computing market, as organizations increasingly rely on specialized expertise to accelerate quantum adoption and maximize the value of emerging quantum technologies. These services include quantum consulting, algorithm development, software integration, cloud-based quantum access, system implementation, training, maintenance, and managed quantum computing solutions that support organizations across industries such as BFSI, healthcare, pharmaceuticals, manufacturing, energy, aerospace, and logistics. Quantum computing services help enterprises identify high-value use cases, develop proof-of-concept applications, optimize computational workflows, and navigate the complexities associated with quantum technology deployment.

Segmentation 4: by Deployment

On-Premises

Cloud

Hybrid

Cloud to Maintain Dominance in the Global Quantum Computing Market (by Deployment)

Cloud-based deployment is a key enabler in maintaining dominance within the global quantum computing market, offering scalable, flexible, and cost-efficient access to advanced quantum computing resources without the need for heavy on-premises infrastructure. It allows organizations to access quantum processors, simulators, and hybrid quantum-classical computing environments on demand, enabling efficient execution, storage, and analysis of complex computational workloads. Cloud-based quantum platforms also support rapid experimentation, faster development cycles, and broader accessibility for enterprises, research institutions, and government agencies across industries such as BFSI, healthcare, pharmaceuticals, energy, manufacturing, logistics, and aerospace.

Segmentation 5: by Technology

Superconducting Qubits

Trapped Ions

Photonics Network

Quantum Annealing

Others (Neutral Atom, Spin Qubits, etc.)

Superconducting Qubits to Maintain Dominance in the Global Quantum Computing Market (by Technology)

Superconducting qubits are a leading technology segment driving dominance within the global quantum computing market, offering fast gate speeds, strong scalability potential, and compatibility with existing semiconductor fabrication techniques. These systems enable efficient execution of quantum algorithms for complex applications such as optimization, molecular simulation, cryptography, machine learning, and financial modeling, where high computational power is required to solve problems beyond classical computing capabilities. Their ability to be integrated into quantum processors with relatively mature engineering processes has positioned superconducting qubits as one of the most commercially advanced and widely adopted quantum technologies.

Segmentation 6: by Region

North America: U.S., Canada, and Mexico

Europe: Germany, France, U.K., Italy, Spain, and Rest-of-Europe

Asia-Pacific: China, Japan, South Korea, India, and Rest-of-Asia-Pacific

Rest-of-the-World: South America, and Middle East, and Africa

North America is Leading in the Global Quantum Computing Market (by Region)

North America leads the global quantum computing market due to its strong technological infrastructure, early investment in quantum research, and robust ecosystem of technology providers, research institutions, and enterprise adopters. The region benefits from significant public and private funding initiatives, including national quantum programs, defense-backed research investments, and substantial venture capital participation, all of which accelerate the development of quantum hardware, software, and hybrid computing platforms. The presence of leading technology companies and cloud service providers further strengthens the region's capability to commercialize and scale quantum computing solutions.

Demand: Drivers, Limitations, and Opportunities

Market Demand Drivers: Rising Demand for High-Performance Computing (HPC) beyond Classical Limits

Key driving factors for the growth of the quantum computing market include the rapidly increasing demand for high-performance computing (HPC) capabilities that extend beyond the limitations of classical computing systems. Organizations across industries such as BFSI, healthcare, pharmaceuticals, energy, logistics, manufacturing, and aerospace are increasingly encountering complex computational problems related to optimization, simulation, cryptography, and large-scale data analysis that cannot be efficiently solved using traditional computing architectures. Quantum computing is emerging as a critical solution to address these challenges by enabling exponentially faster processing for specific classes of problems.

Advancements in quantum hardware, including superconducting qubits, trapped-ion systems, and photonic quantum technologies, are significantly enhancing computational capabilities while improving system scalability and reliability. The integration of quantum

computing with artificial intelligence, machine learning, cloud computing, and hybrid quantum-classical frameworks is further accelerating adoption by enabling organizations to explore quantum-enhanced solutions without requiring fully mature standalone quantum systems. Cloud-based Quantum-as-a-Service (QaaS) platforms are also lowering entry barriers, allowing enterprises to access quantum resources on demand for experimentation, research, and application development.

Market Challenges: High Infrastructure Complexity and Cost

A major challenge restraining the growth of the quantum computing market is the high infrastructure complexity and cost associated with developing, deploying, and maintaining quantum systems. Quantum computers require highly specialized environments, including ultra-low-temperature cryogenic cooling systems, advanced vacuum chambers, precision control electronics, and highly stable electromagnetic conditions to ensure qubit stability and minimize decoherence. These stringent requirements significantly increase capital expenditure and operational costs, making large-scale commercialization difficult for many organizations.

The development of quantum hardware and supporting infrastructure demands advanced engineering capabilities, specialized materials, and highly controlled fabrication processes. Building scalable quantum processors, improving qubit coherence times, and implementing reliable quantum error correction systems remain technically complex and resource-intensive. These challenges further extend development timelines and increase the cost of innovation, limiting the speed at which quantum computing can transition from experimental research to widespread commercial adoption.

Market Opportunities: Cybersecurity Transformation via Post-quantum Cryptography (PQC)

A significant opportunity for growth in the quantum computing market lies in the accelerating need for cybersecurity transformation through Post-Quantum Cryptography (PQC). As quantum computing advances, traditional encryption methods such as RSA and ECC are expected to become vulnerable to quantum-enabled attacks, creating an urgent global demand for quantum-resistant security frameworks. This transition is driving governments, financial institutions, defense organizations, and critical infrastructure operators to invest in PQC research, standardization, and implementation strategies to safeguard sensitive data in a post-quantum era.

Countries across North America, Europe, and Asia-Pacific are increasingly prioritizing national cybersecurity resilience programs, supported by regulatory bodies and standards organizations focused on developing quantum-safe encryption protocols. These initiatives are fostering collaboration between quantum technology providers, cybersecurity firms, cloud service providers, and academic institutions to design, test, and deploy PQC algorithms that can withstand quantum-level computational threats. The integration of quantum computing with cybersecurity frameworks is also enabling the development of advanced encryption techniques, secure communication systems, and enhanced threat detection capabilities.

How can this report add value to an organization?

Product/Innovation Strategy: This report delivers comprehensive insights into advancing quantum computing technologies for commercial and enterprise applications, enabling organizations to align their product strategies with rapidly evolving market demands. It examines innovations including quantum hardware advancements (such as superconducting qubits, trapped-ion systems, and photonic architectures), quantum algorithms, hybrid quantum-classical computing, cloud-based quantum platforms, and AI/ML integration for enhanced computational performance. These developments are transforming complex problem-solving workflows by improving processing speed, optimization efficiency, simulation accuracy, scalability, and predictive capabilities across industries such as BFSI, healthcare, pharmaceuticals, logistics, energy, and manufacturing. By identifying key technological trends, platform benchmarks, and capability gaps, the report supports R&D prioritization, innovation roadmaps, and long-term strategic positioning in the quantum computing ecosystem.

Growth/Marketing Strategy: The quantum computing market presents significant growth opportunities for established technology providers, cloud service companies, and emerging quantum startups. Leading strategies include continuous technological innovation, development of industry-specific quantum use cases, expansion of Quantum-as-a-Service (QaaS) offerings, and strategic partnerships across academia, government, and enterprise sectors. Companies are increasingly investing in quantum software development, error-correction improvements, algorithm optimization, and cloud integration to address the rising demand for advanced computational solutions. The growing focus on cybersecurity (including post-quantum cryptography), digital transformation initiatives, and high-performance computing requirements is accelerating adoption and expanding global market penetration.

Competitive Strategy: The report profiles leading companies in the quantum computing

market, including hardware developers, quantum software providers, cloud platform operators, and integrated quantum solution developers. A comprehensive competitive landscape analysis highlights positioning based on technological capabilities, qubit scalability, strength in algorithm development, cloud accessibility, and ecosystem partnerships. This analysis enables stakeholders to identify high-growth segments and refine their competitive positioning through advancements in quantum processing power, software toolkits, and industry-specific applications. As demand for quantum-enabled solutions intensifies, competition is expected to increasingly focus on hardware performance, error mitigation, cloud scalability, and seamless integration with enterprise computing environments.

Research Methodology

Factors for Data Prediction and Modeling

The base currency considered for the quantum computing market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate on the Oanda website.

Nearly all the recent developments from January 2021 to March 2026 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the use of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the quantum computing market.

The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes has been explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the quantum computing market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of reports, segmentation, and key qualitative findings
- understanding the competitive landscape
- validation of the numbers of various markets for the market type
- percentage split of individual markets for geographical analysis

Secondary Research

This research study involves the use of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as

Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as the World Economic Forum Quantum Economy Network, the European Quantum Industry Consortium (QuIC), and the Quantum Economic Development Consortium (QED-C).

Secondary research was done to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- segmentations and percentage shares

- data for market value

- key industry trends of the top players in the market

- qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

- quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies profiled in the quantum computing market have been selected based on insights gathered from primary industry experts, who evaluated company presence, technology portfolios, and market penetration across key industry verticals and regional markets. The assessment framework focuses on identifying organizations with strong capabilities in quantum hardware development, quantum software platforms, quantum algorithms, cloud-based quantum computing services, quantum error correction, and hybrid quantum-classical computing solutions, along with their ability to support diverse research, commercial, and industrial applications.

The competitive landscape comprises a mix of established technology companies, specialized quantum computing firms, cloud service providers, and research-driven startups that are actively advancing their offerings to address the growing demand for

high-performance computing and quantum-enabled solutions. These companies are distinguished by their ability to develop scalable quantum processors, provide robust software development environments, deliver industry-specific quantum applications, and support integration with existing computing infrastructures. Key application areas include financial modeling, drug discovery, materials science, cybersecurity, logistics optimization, and artificial intelligence. Additionally, continuous investments in research and development, strategic collaborations with academic institutions, government agencies, and enterprise customers, advancements in quantum hardware and software ecosystems, and a strong focus on commercialization, scalability, and security have been considered critical factors in determining their inclusion and positioning within the quantum computing market.

Some of the prominent names in the quantum computing market are:

Alphabate Inc.

D-Wave Quantum Inc.

IonQ, Inc.

Rigetti & Co., LLC.

Honeywell International Inc.

Microsoft

Intel Corporation

Fujitsu

PsiQuantum

Alice & Bob

IQM Quantum Computers

Infleqtion, Inc.

Phasecraft

QuEra Computing Inc.

Q-CTRL

Companies that are not part of the aforementioned pool have been well represented across different sections of the quantum computing report (wherever applicable).

Contents

Executive Summary
Scope and Definition

1 MARKET: INDUSTRY OUTLOOK

- 1.1 Trends: Current and Future Impact Assessment
 - 1.1.1 Shift from Qubit Scaling to Error Correction and Logical Qubits
 - 1.1.2 Transition toward Software and Platform-based Quantum Ecosystems
 - 1.1.3 Emergence of Quantum and AI Convergence
- 1.2 Supply Chain Overview
 - 1.2.1 Value Chain Analysis
- 1.3 Regulatory Landscape/Ecosystem/Ongoing Programs
 - 1.3.1 Regulatory Landscape
 - 1.3.1.1 Data Privacy and Data Protection
 - 1.3.2 Ongoing Programs and Industry Consortia
 - 1.3.2.1 Quantum Economic Development Consortium (QED-C)
 - 1.3.2.2 Quantum Industry Consortium (QulC)
 - 1.3.2.3 European Telecommunications Standards Institute (ETSI)
 - 1.3.2.4 Quantum Computing Society of India (QSI)
 - 1.3.2.5 China Quantum Industry Alliance (CQIA)
- 1.4 Investment Landscape
- 1.5 Research and Development Review
- 1.6 Stakeholder Analysis
 - 1.6.1 Use Case
 - 1.6.2 End User and Buying Criteria
- 1.7 Impact Analysis for Key Global Events
 - 1.7.1 Impact of COVID-19 Pandemic
 - 1.7.2 Impact of the Russia-Ukraine War
- 1.8 Market Dynamics
 - 1.8.1 Market Drivers
 - 1.8.1.1 Rising Demand for High-Performance Computing (HPC) beyond Classical Limits
 - 1.8.1.2 Rapid Growth of Quantum-as-a-Service (QaaS) and Cloud Access Platforms
 - 1.8.1.3 Increasing Government Funding and National Quantum Initiatives
 - 1.8.1.4 Expanding Ecosystem Partnerships between Hyperscalers and Startups
 - 1.8.2 Market Challenges
 - 1.8.2.1 High Infrastructure Complexity and Cost

- 1.8.2.2 Talent Shortage and Limited Enterprise Readiness
- 1.8.3 Market Opportunities
 - 1.8.3.1 Cybersecurity Transformation via Post-Quantum Cryptography (PQC)
 - 1.8.3.2 Hybrid Quantum-Classical Computing Applications
 - 1.8.3.3 Breakthrough Potential in Drug Discovery and Materials Science
- 1.9 Industry Attractiveness: Porter's Five Forces Analysis for the Quantum Computing Market

2 APPLICATION

- 2.1 Application Summary
- 2.2 Quantum Computing Market (by Application)
 - 2.2.1 Optimization
 - 2.2.2 Simulation
 - 2.2.3 Quantum Machine Learning
 - 2.2.4 Others (Cryptography and Cybersecurity, among others)
- 2.3 Quantum Computing Market (by End User)
 - 2.3.1 Aerospace and Defense
 - 2.3.2 Banking, Financial Services, and Insurance (BFSI)
 - 2.3.3 Healthcare
 - 2.3.4 Automotive
 - 2.3.5 Energy and Power
 - 2.3.6 Chemical
 - 2.3.7 Government
 - 2.3.8 Others (Telecommunications, Academia, and Research Institutes, among others)

3 PRODUCTS

- 3.1 Product Summary
- 3.2 Quantum Computing Market (by Offering)
 - 3.2.1 Hardware
 - 3.2.2 Software
 - 3.2.3 Services
- 3.3 Quantum Computing Market (by Deployment)
 - 3.3.1 On-Premises
 - 3.3.2 Cloud
 - 3.3.3 Hybrid
- 3.4 Quantum Computing Market (by Technology)
 - 3.4.1 Superconducting Qubits

- 3.4.2 Trapped Ions
- 3.4.3 Photonics Network
- 3.4.4 Quantum Annealing
- 3.4.5 Others (Neutral atom and spin qubits, among others)

4 REGION

- 4.1 Regional Summary
- 4.2 North America
 - 4.2.1 Regional Overview
 - 4.2.1.1 Driving Factors for Market Growth
 - 4.2.1.2 Factors Challenging the Market
 - 4.2.2 Application
 - 4.2.3 Product
 - 4.2.4 North America (by Country)
 - 4.2.4.1 U.S.
 - 4.2.4.1.1 Application
 - 4.2.4.1.2 Product
 - 4.2.4.2 Canada
 - 4.2.4.2.1 Application
 - 4.2.4.2.2 Product
 - 4.2.4.3 Mexico
 - 4.2.4.3.1 Application
 - 4.2.4.3.2 Product
- 4.3 Europe
 - 4.3.1 Regional Overview
 - 4.3.1.1 Driving Factors for Market Growth
 - 4.3.1.2 Factors Challenging the Market
 - 4.3.2 Application
 - 4.3.3 Product
 - 4.3.4 Europe (by Country)
 - 4.3.4.1 Germany
 - 4.3.4.1.1 Application
 - 4.3.4.1.2 Product
 - 4.3.4.2 France
 - 4.3.4.2.1 Application
 - 4.3.4.2.2 Product
 - 4.3.4.3 Italy
 - 4.3.4.3.1 Application

- 4.3.4.3.2 Product
- 4.3.4.4 Spain
 - 4.3.4.4.1 Application
 - 4.3.4.4.2 Product
- 4.3.4.5 U.K.
 - 4.3.4.5.1 Application
 - 4.3.4.5.2 Product
- 4.3.4.6 Rest-of-Europe
 - 4.3.4.6.1 Application
 - 4.3.4.6.2 Product
- 4.4 Asia-Pacific
 - 4.4.1 Regional Overview
 - 4.4.1.1 Driving Factors for Market Growth
 - 4.4.1.2 Factors Challenging the Market
 - 4.4.2 Application
 - 4.4.3 Product
 - 4.4.4 Asia-Pacific (by Country)
 - 4.4.4.1 China
 - 4.4.4.1.1 Application
 - 4.4.4.1.2 Product
 - 4.4.4.2 Japan
 - 4.4.4.2.1 Application
 - 4.4.4.2.2 Product
 - 4.4.4.3 India
 - 4.4.4.3.1 Application
 - 4.4.4.3.2 Product
 - 4.4.4.4 South Korea
 - 4.4.4.4.1 Application
 - 4.4.4.4.2 Product
 - 4.4.4.5 Rest-of-Asia-Pacific
 - 4.4.4.5.1 Application
 - 4.4.4.5.2 Product
- 4.5 Rest-of-the-World
 - 4.5.1 Regional Overview
 - 4.5.1.1 Driving Factors for Market Growth
 - 4.5.1.2 Factors Challenging the Market
 - 4.5.2 Application
 - 4.5.3 Product
 - 4.5.4 Rest-of-the-World (by Region)

- 4.5.4.1 South America
 - 4.5.4.1.1 Application
 - 4.5.4.1.2 Product
- 4.5.4.2 Middle East and Africa
 - 4.5.4.2.1 Application
 - 4.5.4.2.2 Product

5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES

- 5.1 Next Frontiers
- 5.2 Company Profiles
 - 5.2.1 Alphabet Inc.
 - 5.2.1.1 Overview
 - 5.2.1.2 Top Products/Product Portfolio
 - 5.2.1.3 Top Competitors
 - 5.2.1.4 Target Customers
 - 5.2.1.5 Key Personnel
 - 5.2.1.6 Analyst View
 - 5.2.1.7 Market Share, 2025
 - 5.2.2 IonQ, Inc.
 - 5.2.2.1 Overview
 - 5.2.2.2 Top Products/Product Portfolio
 - 5.2.2.3 Top Competitors
 - 5.2.2.4 Target Customers
 - 5.2.2.5 Key Personnel
 - 5.2.2.6 Analyst View
 - 5.2.2.7 Market Share, 2025
 - 5.2.3 D-Wave Quantum Inc.
 - 5.2.3.1 Overview
 - 5.2.3.2 Top Products/Product Portfolio
 - 5.2.3.3 Top Competitors
 - 5.2.3.4 Target Customers
 - 5.2.3.5 Key Personnel
 - 5.2.3.6 Analyst View
 - 5.2.3.7 Market Share, 2025
 - 5.2.4 Rigetti & Co, LLC.
 - 5.2.4.1 Overview
 - 5.2.4.2 Top Products/Product Portfolio
 - 5.2.4.3 Top Competitors

- 5.2.4.4 Target Customers
- 5.2.4.5 Key Personnel
- 5.2.4.6 Analyst View
- 5.2.4.7 Market Share, 2025
- 5.2.5 Honeywell International Inc.
 - 5.2.5.1 Overview
 - 5.2.5.2 Top Products/Product Portfolio
 - 5.2.5.3 Top Competitors
 - 5.2.5.4 Target Customers
 - 5.2.5.5 Key Personnel
 - 5.2.5.6 Analyst View
 - 5.2.5.7 Market Share, 2025
- 5.2.6 Microsoft
 - 5.2.6.1 Overview
 - 5.2.6.2 Top Products/Product Portfolio
 - 5.2.6.3 Top Competitors
 - 5.2.6.4 Target Customers
 - 5.2.6.5 Key Personnel
 - 5.2.6.6 Analyst View
 - 5.2.6.7 Market Share, 2025
- 5.2.7 Intel Corporation
 - 5.2.7.1 Overview
 - 5.2.7.2 Top Products/Product Portfolio
 - 5.2.7.3 Top Competitors
 - 5.2.7.4 Target Customers
 - 5.2.7.5 Key Personnel
 - 5.2.7.6 Analyst View
 - 5.2.7.7 Market Share, 2025
- 5.2.8 Fujitsu
 - 5.2.8.1 Overview
 - 5.2.8.2 Top Products/Product Portfolio
 - 5.2.8.3 Top Competitors
 - 5.2.8.4 Target Customers
 - 5.2.8.5 Key Personnel
 - 5.2.8.6 Analyst View
 - 5.2.8.7 Market Share, 2025
- 5.2.9 PsiQuantum
 - 5.2.9.1 Overview
 - 5.2.9.2 Top Products/Product Portfolio

- 5.2.9.3 Top Competitors
- 5.2.9.4 Target Customers
- 5.2.9.5 Key Personnel
- 5.2.9.6 Analyst View
- 5.2.9.7 Market Share, 2025
- 5.2.10 Alice & Bob
 - 5.2.10.1 Overview
 - 5.2.10.2 Top Products/Product Portfolio
 - 5.2.10.3 Top Competitors
 - 5.2.10.4 Target Customers
 - 5.2.10.5 Key Personnel
 - 5.2.10.6 Analyst View
 - 5.2.10.7 Market Share, 2025
- 5.2.11 Inflection, Inc.
 - 5.2.11.1 Overview
 - 5.2.11.2 Top Products/Product Portfolio
 - 5.2.11.3 Top Competitors
 - 5.2.11.4 Target Customers
 - 5.2.11.5 Key Personnel
 - 5.2.11.6 Analyst View
 - 5.2.11.7 Market Share, 2025
- 5.2.12 QuEra Computing Inc.
 - 5.2.12.1 Overview
 - 5.2.12.2 Top Products/Product Portfolio
 - 5.2.12.3 Top Competitors
 - 5.2.12.4 Target Customers
 - 5.2.12.5 Key Personnel
 - 5.2.12.6 Analyst View
 - 5.2.12.7 Market Share, 2025
- 5.2.13 IQM Quantum Computers
 - 5.2.13.1 Overview
 - 5.2.13.2 Top Products/Product Portfolio
 - 5.2.13.3 Top Competitors
 - 5.2.13.4 Target Customers
 - 5.2.13.5 Key Personnel
 - 5.2.13.6 Analyst View
 - 5.2.13.7 Market Share, 2025
- 5.2.14 Phasecraft
 - 5.2.14.1 Overview

- 5.2.14.2 Top Products/Product Portfolio
- 5.2.14.3 Top Competitors
- 5.2.14.4 Target Customers
- 5.2.14.5 Key Personnel
- 5.2.14.6 Analyst View
- 5.2.14.7 Market Share, 2025
- 5.2.15 Q-CTRL
 - 5.2.15.1 Overview
 - 5.2.15.2 Top Products/Product Portfolio
 - 5.2.15.3 Top Competitors
 - 5.2.15.4 Target Customers
 - 5.2.15.5 Key Personnel
 - 5.2.15.6 Analyst View
 - 5.2.15.7 Market Share, 2025
- 5.2.16 List of Other Key Companies

6 RESEARCH METHODOLOGY

- 6.1 Data Sources
 - 6.1.1 Primary Data Sources
 - 6.1.2 Secondary Data Sources
 - 6.1.3 Data Triangulation
- 6.2 Market Estimation and Forecast

List Of Figures

LIST OF FIGURES

Figure 1: Global Quantum Computing Market (by Scenario), \$Million, 2025, 2030, and 2035

Figure 2: Global Quantum Computing Market, 2025 and 2035

Figure 3: Top 9 Countries, Global Quantum Computing Market, \$Million, 2025

Figure 4: Global Market Snapshot, 2025

Figure 5: Global Quantum Computing Market, \$Million, 2025 and 2035

Figure 6: Global Quantum Computing Market (by Application), \$Million, 2025, 2030, and 2035

Figure 7: Global Quantum Computing Market (by End User), \$Million, 2025, 2030, and 2035

Figure 8: Global Quantum Computing Market (by Offering), \$Million, 2025, 2030, and 2035

Figure 9: Global Quantum Computing Market (by Deployment), \$Million, 2025, 2030, and 2035

Figure 10: Global Quantum Computing Market (by Technology), \$Million, 2025, 2030, and 2035

Figure 11: Quantum Computing Market Segmentation

Figure 12: Value Chain Analysis

Figure 13: Patent Filing Trend, 2022-2025, by Country

Figure 14: Patents Filed, 2022-2025, by Company

Figure 15: Quantum Material Simulation for Electric Vehicle Batteries, Case Study

Figure 16: Quantum Systems for Quantum-Safe Communications, Case Study

Figure 17: Object Detection for Autonomous Mobility, Case Study

Figure 18: Hydrogen Fuel Cell Materials Simulation, Case Study

Figure 19: Quantum Computing Access via Emulation & Data Center Infrastructure, Case Study

Figure 20: Stakeholder Analysis

Figure 21: Global Quantum Computing Market (by Application), Value, \$Million, 2025, 2030, and 2035

Figure 22: Global Quantum Computing Market (by End User), Value, \$Million, 2025, 2030, and 2035

Figure 23: Global Quantum Computing Market (Optimization), Value, \$Million, 2025-2035

Figure 24: Global Quantum Computing Market (Simulation), Value, \$Million, 2025-2035

Figure 25: Global Quantum Computing Market (Quantum Machine Learning), Value,

\$Million, 2025-2035

Figure 26: Global Quantum Computing Market (Others), Value, \$Million, 2025-2035

Figure 27: Global Quantum Computing Market (Aerospace and Defense), Value, \$Million, 2025-2035

Figure 28: Global Quantum Computing Market (BFSI), Value, \$Million, 2025-2035

Figure 29: Global Quantum Computing Market (Healthcare), Value, \$Million, 2025-2035

Figure 30: Global Quantum Computing Market (Automotive), Value, \$Million, 2025-2035

Figure 31: Global Quantum Computing Market (Energy and Power), Value, \$Million, 2025-2035

Figure 32: Global Quantum Computing Market (Chemical), Value, \$Million, 2025-2035

Figure 33: Global Quantum Computing Market (Government), Value, \$Million, 2025-2035

Figure 34: Global Quantum Computing Market (Others), Value, \$Million, 2025-2035

Figure 35: Global Quantum Computing Market (by Offering), Value, \$Million, 2025, 2030, and 2035

Figure 36: Global Quantum Computing Market (by Deployment), Value, \$Million, 2025, 2030, and 2035

Figure 37: Global Quantum Computing Market (by Technology), Value, \$Million, 2025, 2030, and 2035

Figure 38: Global Quantum Computing Market (Hardware), Value, \$Million, 2025-2035

Figure 39: Global Quantum Computing Market (Software), Value, \$Million, 2025-2035

Figure 40: Global Quantum Computing Market (Services), Value, \$Million, 2025-2035

Figure 41: Global Quantum Computing Market (On-Premises), Value, \$Million, 2025-2035

Figure 42: Global Quantum Computing Market (Cloud), Value, \$Million, 2025-2035

Figure 43: Global Quantum Computing Market (Hybrid), Value, \$Million, 2025-2035

Figure 44: Global Quantum Computing Market (Superconducting Qubits), Value, \$Million, 2025-2035

Figure 45: Global Quantum Computing Market (Trapped Ions), Value, \$Million, 2025-2035

Figure 46: Global Quantum Computing Market (Photonics Network), Value, \$Million, 2025-2035

Figure 47: Global Quantum Computing Market (Quantum Annealing), Value, \$Million, 2025-2035

Figure 48: Global Quantum Computing Market (Others), Value, \$Million, 2025-2035

Figure 49: U.S. Quantum Computing Market, \$Million, 2025-2035

Figure 50: Canada Quantum Computing Market, \$Million, 2025-2035

Figure 51: Mexico Quantum Computing Market, \$Million, 2025-2035

Figure 52: Germany Quantum Computing Market, \$Million, 2025-2035

- Figure 53: France Quantum Computing Market, \$Million, 2025-2035
- Figure 54: Italy Quantum Computing Market, \$Million, 2025-2035
- Figure 55: Spain Quantum Computing Market, \$Million, 2025-2035
- Figure 56: U.K. Quantum Computing Market, \$Million, 2025-2035
- Figure 57: Rest-of-Europe Quantum Computing Market, \$Million, 2025-2035
- Figure 58: China Quantum Computing Market, \$Million, 2025-2035
- Figure 59: Japan Quantum Computing Market, \$Million, 2025-2035
- Figure 60: India Quantum Computing Market, \$Million, 2025-2035
- Figure 61: South Korea Quantum Computing Market, \$Million, 2025-2035
- Figure 62: Rest-of-Asia-Pacific Quantum Computing Market, \$Million, 2025-2035
- Figure 63: South America Quantum Computing Market, \$Million, 2025-2035
- Figure 64: Middle East and Africa Quantum Computing Market, \$Million, 2025-2035
- Figure 65: Data Triangulation
- Figure 66: Top-Down and Bottom-Up Approach
- Figure 67: Assumptions and Limitations

List Of Tables

LIST OF TABLES

Table 1: Market Snapshot

Table 2: Competitive Landscape Snapshot

Table 3: Trends: Current and Future Impact Assessment

Table 4: Supply Chain Overview

Table 5: Investment Landscape across Key Companies

Table 6: Key R&D Areas for Quantum Computing

Table 7: Drivers, Challenges, and Opportunities, 2025-2035

Table 8: Porter's Five Forces Analysis

Table 9: Global Quantum Computing Market (by Region), \$Million, 2025-2035

Table 10: Global Quantum Computing Market (by Application), \$Million, 2025-2035

Table 11: Global Quantum Computing Market (by End User), \$Million, 2025-2035

Table 12: Global Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 13: Global Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 14: Global Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 15: North America Quantum Computing Market (by Application), \$Million, 2025-2035

Table 16: North America Quantum Computing Market (by End User), \$Million, 2025-2035

Table 17: North America Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 18: North America Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 19: North America Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 20: U.S. Quantum Computing Market (by Application), \$Million, 2025-2035

Table 21: U.S. Quantum Computing Market (by End User), \$Million, 2025-2035

Table 22: U.S. Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 23: U.S. Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 24: U.S. Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 25: Canada Quantum Computing Market (by Application), \$Million, 2025-2035

Table 26: Canada Quantum Computing Market (by End User), \$Million, 2025-2035

Table 27: Canada Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 28: Canada Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 29: Canada Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 30: Mexico Quantum Computing Market (by Application), \$Million, 2025-2035

Table 31: Mexico Quantum Computing Market (by End User), \$Million, 2025-2035

Table 32: Mexico Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 33: Mexico Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 34: Mexico Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 35: Europe Quantum Computing Market (by Application), \$Million, 2025-2035

Table 36: Europe Quantum Computing Market (by End User), \$Million, 2025-2035

Table 37: Europe Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 38: Europe Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 39: Europe Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 40: Germany Quantum Computing Market (by Application), \$Million, 2025-2035

Table 41: Germany Quantum Computing Market (by End User), \$Million, 2025-2035

Table 42: Germany Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 43: Germany Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 44: Germany Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 45: France Quantum Computing Market (by Application), \$Million, 2025-2035

Table 46: France Quantum Computing Market (by End User), \$Million, 2025-2035

Table 47: France Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 48: France Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 49: France Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 50: Italy Quantum Computing Market (by Application), \$Million, 2025-2035

Table 51: Italy Quantum Computing Market (by End User), \$Million, 2025-2035

Table 52: Italy Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 53: Italy Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 54: Italy Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 55: Spain Quantum Computing Market (by Application), \$Million, 2025-2035

Table 56: Spain Quantum Computing Market (by End User), \$Million, 2025-2035

Table 57: Spain Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 58: Spain Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 59: Spain Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 60: U.K. Quantum Computing Market (by Application), \$Million, 2025-2035

Table 61: U.K. Quantum Computing Market (by End User), \$Million, 2025-2035

Table 62: U.K. Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 63: U.K. Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 64: U.K. Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 65: Rest-of-Europe Quantum Computing Market (by Application), \$Million, 2025-2035

Table 66: Rest-of-Europe Quantum Computing Market (by End User), \$Million, 2025-2035

Table 67: Rest-of-Europe Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 68: Rest-of-Europe Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 69: Rest-of-Europe Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 70: Asia-Pacific Quantum Computing Market (by Application), \$Million, 2025-2035

Table 71: Asia-Pacific Quantum Computing Market (by End User), \$Million, 2025-2035

Table 72: Asia-Pacific Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 73: Asia-Pacific Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 74: Asia-Pacific Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 75: China Quantum Computing Market (by Application), \$Million, 2025-2035

Table 76: China Quantum Computing Market (by End User), \$Million, 2025-2035

Table 77: China Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 78: China Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 79: China Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 80: Japan Quantum Computing Market (by Application), \$Million, 2025-2035

Table 81: Japan Quantum Computing Market (by End User), \$Million, 2025-2035

Table 82: Japan Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 83: Japan Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 84: Japan Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 85: India Quantum Computing Market (by Application), \$Million, 2025-2035

Table 86: India Quantum Computing Market (by End User), \$Million, 2025-2035

Table 87: India Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 88: India Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 89: India Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 90: South Korea Quantum Computing Market (by Application), \$Million, 2025-2035

Table 91: South Korea Quantum Computing Market (by End User), \$Million, 2025-2035

Table 92: South Korea Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 93: South Korea Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 94: South Korea Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 95: Rest-of-Asia-Pacific Quantum Computing Market (by Application), \$Million, 2025-2035

Table 96: Rest-of-Asia-Pacific Quantum Computing Market (by End User), \$Million, 2025-2035

Table 97: Rest-of-Asia-Pacific Quantum Computing Market (by Offering), \$Million,

2025-2035

Table 98: Rest-of-Asia-Pacific Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 99: Rest-of-Asia-Pacific Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 100: Rest-of-the-World Quantum Computing Market (by Application), \$Million, 2025-2035

Table 101: Rest-of-the-World Quantum Computing Market (by End User), \$Million, 2025-2035

Table 102: Rest-of-the-World Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 103: Rest-of-the-World Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 104: Rest-of-the-World Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 105: South America Quantum Computing Market (by Application), \$Million, 2025-2035

Table 106: South America Quantum Computing Market (by End User), \$Million, 2025-2035

Table 107: South America Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 108: South America Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 109: South America Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 110: Middle East and Africa Quantum Computing Market (by Application), \$Million, 2025-2035

Table 111: Middle East and Africa Quantum Computing Market (by End User), \$Million, 2025-2035

Table 112: Middle East and Africa Quantum Computing Market (by Offering), \$Million, 2025-2035

Table 113: Middle East and Africa Quantum Computing Market (by Deployment), \$Million, 2025-2035

Table 114: Middle East and Africa Quantum Computing Market (by Technology), \$Million, 2025-2035

Table 115: Companies and their Key Developments

Table 116: List of Other Key Companies

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