

Global Post-Quantum Cryptography (PQC) Migration Management Software Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Post-Quantum Cryptography (PQC) Migration Management Software market size was valued at US\$ 667 million in 2025 and is forecast to a readjusted size of US\$ 3008 million by 2032 with a CAGR of 23.6% during review period.

Post-Quantum Cryptography (PQC) Migration Management Software is a cybersecurity software category designed to help governments, financial institutions, telecom operators, cloud service providers, industrial enterprises, healthcare organizations and large corporations discover cryptographic assets, assess quantum-related risks, plan migration roadmaps and govern execution. The software addresses the long-term risk that quantum computers may eventually compromise today's public-key cryptography by identifying where RSA, ECC, DH and other quantum-vulnerable algorithms are used across hardware, software, certificates, keys, protocols, APIs, applications, cloud services and supply chains. It supports cryptographic inventory, risk scoring, migration prioritization, interoperability testing, compliance tracking, vendor readiness management and continuous monitoring based on NIST-standardized PQC algorithms and enterprise security policies. Its strategic value is not limited to algorithm replacement; it enables crypto-agility, supply-chain visibility and cross-functional governance, turning PQC migration into an ongoing cryptographic lifecycle management capability.

PQC Migration Management Software is typically monetized through SaaS subscriptions, enterprise licenses, asset-, certificate-, application- or node-based pricing, and professional service packages. As a cybersecurity and enterprise governance software category, mature subscription products can generally achieve

gross margins of 70%–85%. Upstream inputs include NIST-standardized PQC algorithms, cryptographic libraries, PKI and certificate infrastructure, HSMs, TLS/VPN/SSH protocol stacks, cloud platforms, endpoints, IoT devices, source-code repositories and SBOM data. The midstream layer covers cryptographic discovery, algorithm identification, certificate lifecycle management, risk scoring, migration orchestration, compatibility testing, policy enforcement and audit reporting. Downstream users include government, defense, financial services, telecommunications, cloud computing, energy, industrial control, healthcare and large multinational enterprises.

Market Development Opportunities & Main Driving Factors

The market opportunity for PQC Migration Management Software is shifting from forward-looking security research to compliance-driven and infrastructure-upgrade budgets. NIST's publication of three PQC standards provides a formal algorithmic foundation for enterprise procurement and vendor roadmaps. CISA, NIST and NSA recommend that organizations establish quantum-readiness roadmaps, engage technology vendors, conduct inventories of cryptographic systems and assets, and prioritize the migration of sensitive and critical assets. The UK NCSC has further set milestones for organizations to complete discovery and initial planning by 2028, carry out high-priority migration by 2031 and complete full migration by 2035, while the European Commission has encouraged Member States to build coordinated PQC implementation roadmaps. PQC migration is no longer a single cryptographic library upgrade; it is a multi-year transformation across applications, certificates, devices, cloud environments, supply chains and audit systems. This will drive enterprise demand for cryptographic discovery, migration orchestration, asset governance and compliance reporting software.

Market Challenges, Risks, & Restraints

The main challenge is that PQC migration targets are highly fragmented. Enterprises often cannot immediately identify all traditional public-key cryptography embedded in systems, certificates, connected devices, third-party software, industrial control systems and long-term data storage paths. NIST NCCoE highlights that migration requires organizations to understand where quantum-vulnerable public-key algorithms are used across hardware, software and services, and that cryptographic inventories should support risk management and migration prioritization. This means product adoption depends heavily on the maturity of existing asset management, CMDB, PKI, SBOM and vendor governance processes. In addition, PQC algorithms still require continued validation in performance, key size, protocol compatibility, hardware support and cross-

vendor interoperability. Some legacy systems and critical infrastructure may be difficult or costly to upgrade. As a result, the early market may feature consulting-heavy projects, limited software standardization, long procurement cycles, unclear accountability and functional overlap with PKI, certificate lifecycle management, vulnerability management and GRC platforms.

Downstream Demand Trends

Downstream demand will first come from government, defense, financial services, telecommunications, cloud services, energy and healthcare, because these sectors hold long-lived sensitive data and face stronger regulatory, procurement and supply-chain compliance pressure. Enterprise buying criteria will evolve from 'supporting PQC algorithms' to 'continuously discovering cryptographic assets, quantifying business risk, tracking vendor readiness, producing audit evidence and executing phased migration.' Certificate lifecycle management, software supply-chain security, zero trust, HSM, API security, cloud security and IoT device management will become important integration entry points for PQC migration software. As the UK, EU and U.S. policy roadmaps become clearer, platform products with automated discovery, policy orchestration, hybrid certificate support, crypto-agility assessment, migration dashboards and compliance reporting will be better positioned to enter the long-term cybersecurity budgets of large enterprises and critical infrastructure operators.

This report is a detailed and comprehensive analysis for global Post-Quantum Cryptography (PQC) Migration Management Software market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Post-Quantum Cryptography (PQC) Migration Management Software market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Post-Quantum Cryptography (PQC) Migration Management Software market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Post-Quantum Cryptography (PQC) Migration Management Software market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Post-Quantum Cryptography (PQC) Migration Management Software market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Post-Quantum Cryptography (PQC) Migration Management Software

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Post-Quantum Cryptography (PQC) Migration Management Software market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include IBM, SandboxAQ, Keyfactor, DigiCert, Entrust, AppViewX, Sectigo, QuSecure, Arqit Quantum Inc., Quantum XChange, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market segmentation

Post-Quantum Cryptography (PQC) Migration Management Software market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Cloud-based

On-premises

Market segment by Regulatory Focus

Defense Grade

Commercial Grade

Market segment by Technical Architecture

Crypto-Agility Platforms

Scanning & Inventory Tools

Hybrid Configuration Management Software

Market segment by Application

Government and Defense

Financial Services

Telecommunications

Cloud and Technology Providers

Healthcare and Life Sciences

Energy and Critical Infrastructure

Manufacturing and Automotive

Others

Market segment by players, this report covers

IBM

SandboxAQ

Keyfactor

DigiCert

Entrust

AppViewX

Sectigo

QuSecure

Arqit Quantum Inc.

Quantum XChange

CryptoNext Security

ISARA Corporation

Fortanix

Thales

Samsung SDS

QNu Labs

evolutionQ

SSH Communications Security

PQShield

Utimaco

essendi it GmbH

KryptoCyber

Hangzhou Post-Quantum Cryptography Technology

Houliang Technology

Koal Software

Shenzhen Aolian Information Security

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Post-Quantum Cryptography (PQC) Migration Management Software product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Post-Quantum Cryptography (PQC) Migration Management Software, with revenue, gross margin, and global market share of Post-Quantum Cryptography (PQC) Migration Management Software from 2021 to 2026.

Chapter 3, the Post-Quantum Cryptography (PQC) Migration Management Software

competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Post-Quantum Cryptography (PQC) Migration Management Software market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Post-Quantum Cryptography (PQC) Migration Management Software.

Chapter 13, to describe Post-Quantum Cryptography (PQC) Migration Management Software research findings and conclusion.

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