

# Global Post-Quantum Cryptography (PQC) Solutions 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) Solutions market size was valued at US\$ 1392 million in 2025 and is forecast to a readjusted size of US\$ 4714 million by 2032 with a CAGR of 18.5% during review period.

Post-Quantum Cryptography (PQC) Solutions refer to a broad set of cybersecurity products, software platforms and professional services designed to protect digital systems against the future risk that quantum computers may break today's widely used public-key cryptography, such as RSA, ECC and DH. These solutions help governments, financial institutions, telecom operators, cloud providers, energy companies, industrial enterprises, healthcare organizations and large corporations discover cryptographic assets, assess quantum-related exposure, replace vulnerable algorithms, upgrade certificate and key infrastructures, adapt protocols, remediate applications, validate device compatibility, coordinate suppliers and maintain continuous compliance. The product scope includes PQC algorithm libraries, encryption SDKs, PQC-enabled TLS gateways, VPNs, network security appliances, HSMs, key management systems, PKI and certificate lifecycle management, cryptographic inventory tools, migration management platforms, interoperability testing tools and consulting services.

The gross margin of Post-Quantum Cryptography (PQC) Solutions depends on the product mix. Pure software subscriptions, cryptographic discovery, PKI and certificate management, migration platforms and encryption SDKs generally have strong software characteristics and can reach 70%–85% gross margin at maturity. PQC-enabled gateways, VPNs, HSMs, security chips and encryption appliances typically fall in the

40%–65% range, while consulting, assessment, system remediation, interoperability testing and managed migration services are usually around 35%–60%. Upstream inputs include NIST-standardized PQC algorithms, cryptographic libraries, random-number generation, chips, HSMs, PKI, certificates, cloud platforms, operating systems, browsers, network protocol stacks and security hardware. The midstream layer covers PQC algorithm integration, cryptographic asset discovery, key management, protocol adaptation, certificate lifecycle management, migration orchestration, compatibility testing and compliance audit. Downstream users include government, defense, financial services, telecom, cloud services, energy, industrial control, healthcare, automotive, IoT and large enterprise IT systems.

### Market Development Opportunities & Main Driving Factors

The market opportunity for Post-Quantum Cryptography Solutions is being driven by standardization, government roadmaps and critical infrastructure security upgrades. After NIST released the first three finalized PQC standards, enterprise procurement logic shifted from 'whether to prepare' to 'how to deploy in phases.' CISA, NIST and NSA have also recommended that organizations establish quantum-readiness roadmaps, engage technology vendors, inventory cryptographic systems and assets, and prioritize the migration of sensitive and critical assets. The commercial value of PQC solutions is that they do not merely replace individual algorithms; they cover the full lifecycle of cryptographic discovery, assessment, migration, validation and continuous governance. For CEOs and CISOs, PQC migration represents an infrastructure upgrade window across applications, networks, certificates, cloud environments, devices and supply chains, while also improving crypto-agility, long-term data protection, customer trust and regulatory auditability.

### Market Challenges, Risks, & Restraints

The main challenges are the large migration scope, high technical heterogeneity and long enterprise decision cycle. The UK NCSC describes PQC migration as a mass technology change that will take years, requiring organizations to assess services, applications, data, hardware, software, networking equipment, mobile devices and supplier dependencies. This indicates that PQC implementation is not a standalone security-team project, but an enterprise architecture program. At the same time, PQC algorithms still require continued validation in terms of performance overhead, key size, protocol compatibility, legacy-system support, HSM and endpoint adaptation, and cross-vendor interoperability. In the early market, customers may also face fragmented budgets, unclear boundaries between software and hardware, a high share of

consulting services, insufficiently standardized products, and functional overlap with PKI, certificate management, zero trust, GRC and vulnerability management platforms.

## Downstream Demand Trends

Downstream demand will first emerge from government, defense, financial services, telecom, cloud services, energy, healthcare, industrial control and large multinational enterprises, because these sectors hold long-lived sensitive data, operate under stronger regulatory requirements, manage longer system lifecycles and depend on complex supplier ecosystems. The NCSC timeline calls for organizations to define migration goals, complete discovery and build initial plans by 2028, carry out the highest-priority migration activities by 2031, and complete migration of all systems, services and products by 2035. EU Member States, supported by the European Commission, have also issued a coordinated roadmap to support the transition to PQC. As policy timelines become clearer, downstream procurement will expand from standalone PQC algorithm libraries to end-to-end solutions, including cryptographic inventories, PQC-ready PKI, hybrid certificates, HSM upgrades, network equipment replacement, application remediation, supplier questionnaires, compliance reporting and continuous monitoring.

This report is a detailed and comprehensive analysis for global Post-Quantum Cryptography (PQC) Solutions 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) Solutions market size and forecasts, in consumption value (\$ Million), 2021-2032

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

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

Global Post-Quantum Cryptography (PQC) Solutions 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) Solutions

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) Solutions 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, Thales, Cloudflare, PQShield, AppViewX, Sectigo, etc.

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

Market segmentation

Post-Quantum Cryptography (PQC) Solutions 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

Software

Hardware

Services

Market segment by Crypto-Agility Maturity

Static Replacement

Hybrid Mode

Full Crypto-Agility

#### Market segment by Technology Route

Lattice-based Cryptography

Hash-based Signatures

Code-based Cryptography

Hybrid Classical and PQC Deployment

Hardware-Accelerated PQC

Others

#### 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

Thales

Cloudflare

PQShield

AppViewX

Sectigo

QuSecure

Fortanix

CryptoNext Security

ISARA Corporation

Arqit Quantum

Quantum XChange

Post-Quantum

Crypto4A Technologies

SEALSQ (WISeKey)

Eviden (Atos)

Samsung

Utimaco

Google

AWS

Securosys

SoftIron

SSH Communications Security

QNu Labs

evolutionQ

Qrypt

QryptoCyber

Nexus (IN Groupe)

GMO (GlobalSign)

F5

Hangzhou Post-Quantum Cryptography Technology

Houliang Technology

Koal Software

Zhongfu Information

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) Solutions product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Post-Quantum Cryptography (PQC) Solutions 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) Solutions 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) Solutions.

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

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