

Global Quantum Photonic Integrated Circuit Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Quantum Photonic Integrated Circuit Chip market size is expected to reach \$ 869 million by 2032, rising at a market growth of 30.5% CAGR during the forecast period (2026-2032).

A Quantum Photonic Integrated Circuit Chip refers to a specialized photonic integrated chip, packaged chip or chip-level module that uses photons as quantum information carriers and integrates quantum optical functions such as photon generation, modulation, interference, routing, delay, detection, quantum-state preparation, quantum-state measurement, quantum random number generation and quantum optical interfacing onto a compact semiconductor or hybrid photonic platform. The core technology platforms include silicon photonics, silicon nitride, thin-film lithium niobate, indium phosphide, quantum-dot single-photon sources, integrated waveguides, phase shifters, beam splitters platforms include silicon photonics, silicon nitride, thin-film lithium niobate,, interferometric meshes, on-chip detectors and hybrid photonic packaging.

This study focuses on chips and chip-level modules used in photonic quantum computing, quantum key distribution, quantum random number generation, quantum-secure communications, quantum networking, quantum sensing and research-grade quantum optical systems.

Indicative pricing varies significantly by product maturity and configuration: standard QRNG chips or compact security modules may range from hundreds to several thousand U.S. dollars; research-grade single-photon source chips, chip-scale QKD modules and programmable quantum photonic processors may range from tens of thousands to several hundred thousand U.S. dollars; customized photonic QPUs,

quantum photonic chipsets and dedicated tape-out or packaging services are usually priced on a project, wafer, system or strategic collaboration basis.

Based on our research, the Quantum Photonic Integrated Circuit Chip market should not be treated as a generic sub-segment of the broader photonic integrated circuit industry. Its industrial essence lies in converting quantum optical experiments from bulky, alignment-sensitive and laboratory-based optical benches into compact, packaged and manufacturable chip-level hardware. Compared with classical silicon photonics for data communications or AI optical interconnects, quantum photonic integrated chips require far more stringent performance metrics, including single-photon quality, quantum-state fidelity, optical loss, phase stability, interference accuracy, noise suppression and system-level scalability. Therefore, the appropriate reporting scope should focus on quantum-application-specific photonic chips and chip-level modules, rather than all silicon photonic or integrated photonic devices.

From a supply-side perspective, the global industry is structured around four layers: full-stack photonic quantum computing companies, quantum security chip and module suppliers, specialized photonic foundry platforms, and emerging quantum networking chip developers. PsiQuantum, Xanadu, Quandela, QuiX Quantum, ORCA Computing, TuringQ and QBoson are more closely associated with photonic QPU or photonic quantum computer architectures. ID Quantique, KETS, Quside, Quantum Dice and KEEQuant are more focused on QRNG, QKD and quantum-secure communication use cases. LIGENTEC, GlobalFoundries, imec, SMART Photonics and New Origin provide the process, prototyping and manufacturing infrastructure required for scaling quantum photonic hardware. Because revenue is often recognized through systems, projects, government contracts or cloud access, chip-level revenue must be estimated conservatively and separated from broader system-level value.

From a demand-side perspective, the clearest near-term commercial opportunities are in quantum random number generation, quantum-secure communications, research-grade quantum optical platforms and early photonic quantum processor systems. Longer-term demand is expected to come from fault-tolerant quantum computing, quantum networking, quantum data-center infrastructure and national quantum technology programs. Policy and funding momentum in the United States, Europe and China is supporting the transition from laboratory demonstrations to manufacturable quantum photonic devices. Nevertheless, the market remains constrained by fabrication yield, low-loss integration, photonic packaging, cryogenic or temperature-stable operation, electronic control integration and the lack of large-scale end-user application validation.

From a technology-route perspective, silicon photonics and silicon nitride platforms offer advantages in manufacturability, wafer-scale processing, low-loss waveguides and compatibility with existing semiconductor infrastructure. Thin-film lithium niobate is strategically relevant for high-speed modulation and nonlinear photonic functions, while quantum-dot single-photon sources, on-chip detectors and heterogeneous integration are critical to the scalability of photonic quantum processors. Future competition will not be determined by a single chip metric alone. It will depend on the ability to combine chip design, fabrication, packaging, testing, control electronics, software stack, application ecosystem and capital-intensive manufacturing scale-up.

Overall, the industry is still in an emerging growth phase. It offers high medium-term growth potential, but it also faces meaningful technology-route uncertainty. Superconducting, trapped-ion, neutral-atom and semiconductor-spin quantum computing platforms remain strong alternative routes. Photonic quantum chips are most likely to generate clearer revenue first in QRNG, chip-scale QKD, deterministic single-photon sources, quantum networking interfaces and research-grade photonic processors, before expanding into larger-scale photonic QPUs and quantum data-center infrastructure.

This report studies the global Quantum Photonic Integrated Circuit Chip demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Quantum Photonic Integrated Circuit Chip, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Quantum Photonic Integrated Circuit Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Quantum Photonic Integrated Circuit Chip total market, 2021-2032, (USD Million)

Global Quantum Photonic Integrated Circuit Chip total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Quantum Photonic Integrated Circuit Chip total market, key domestic companies, and share, (USD Million)

Global Quantum Photonic Integrated Circuit Chip revenue by player, revenue and market share 2021-2026, (USD Million)

Global Quantum Photonic Integrated Circuit Chip total market by Product Function, CAGR, 2021-2032, (USD Million)

Global Quantum Photonic Integrated Circuit Chip total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Quantum Photonic Integrated Circuit Chip 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 PsiQuantum, Xanadu, Quandela, QuiX Quantum, ORCA Computing, ID Quantique, KETS Quantum Security, Sparrow Quantum, Aegiq, Quantum Dice, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Quantum Photonic Integrated Circuit Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Product Function, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Quantum Photonic Integrated Circuit Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Quantum Photonic Integrated Circuit Chip Market, Segmentation by Product Function:

Photonic QPU / Processor Chip

Quantum Security Chip

Quantum Light Source Chip

Quantum Interface / Networking Chip

Global Quantum Photonic Integrated Circuit Chip Market, Segmentation by Technology Platform:

Silicon Photonics

Silicon Nitride

Thin-film Lithium Niobate

Other / Hybrid Platforms

Global Quantum Photonic Integrated Circuit Chip Market, Segmentation by Supplier Type:

Full-stack Quantum Hardware Company

Chip / Module Supplier

Photonic Foundry / Pilot Line

Research-to-Commercial Supplier

Global Quantum Photonic Integrated Circuit Chip Market, Segmentation by Application:

Quantum Computing

Quantum Communication

Quantum Random Number Generation

Quantum Sensing / Research

Companies Profiled:

PsiQuantum

Xanadu

Quandela

QuiX Quantum

ORCA Computing

ID Quantique

KETS Quantum Security

Sparrow Quantum

Aegiq

Quantum Dice

Quside Technologies

KEEQuant

TuringQ

QBoson

Quantum Computing Inc.

LIGEN TEC

GlobalFoundries

SMART Photonics

imec

QphoX

Cisco Systems

Toshiba Group

New Origin

QPICs

Key Questions Answered

1. How big is the global Quantum Photonic Integrated Circuit Chip market?
2. What is the demand of the global Quantum Photonic Integrated Circuit Chip market?
3. What is the year over year growth of the global Quantum Photonic Integrated Circuit Chip market?
4. What is the total value of the global Quantum Photonic Integrated Circuit Chip market?
5. Who are the Major Players in the global Quantum Photonic Integrated Circuit Chip market?
6. What are the growth factors driving the market demand?

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