

Global Quantum Photonic Integrated Circuit Chip Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Quantum Photonic Integrated Circuit Chip market size is predicted to grow from US\$ 116 million in 2025 to US\$ 901 million in 2032; it is expected to grow at a CAGR of 32.4% from 2026 to 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.

LPI (LP Information)'s newest research report, the 'Quantum Photonic Integrated Circuit Chip Industry Forecast' looks at past sales and reviews total world Quantum Photonic Integrated Circuit Chip sales in 2025, providing a comprehensive analysis by region and market sector of projected Quantum Photonic Integrated Circuit Chip sales for 2026 through 2032. With Quantum Photonic Integrated Circuit Chip sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Quantum Photonic Integrated Circuit Chip industry.

This Insight Report provides a comprehensive analysis of the global Quantum Photonic Integrated Circuit Chip landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Quantum Photonic Integrated Circuit Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Quantum Photonic Integrated Circuit Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Quantum Photonic Integrated Circuit Chip and breaks

down the forecast by Product Function, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Quantum Photonic Integrated Circuit Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of Quantum Photonic Integrated Circuit Chip market by product type, application, key players and key regions and countries.

Segmentation by Product Function:

Photonic QPU / Processor Chip

Quantum Security Chip

Quantum Light Source Chip

Quantum Interface / Networking Chip

Segmentation by Technology Platform:

Silicon Photonics

Silicon Nitride

Thin-film Lithium Niobate

Other / Hybrid Platforms

Segmentation by Supplier Type:

Full-stack Quantum Hardware Company

Chip / Module Supplier

Photonic Foundry / Pilot Line

Research-to-Commercial Supplier

Segmentation by Application:

Quantum Computing

Quantum Communication

Quantum Random Number Generation

Quantum Sensing / Research

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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.

LIGENTEC

GlobalFoundries

SMART Photonics

imec

QphoX

Cisco Systems

Toshiba Group

New Origin

QPICs

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