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Post-Quantum Cryptography (PQC) Market by Solution (Quantum-safe Hardware, Quantum-resistant Encryption Products, Cryptographic Libraries, VPN, Authentication), Service (Migration Services, Quantum Risk Assessment) - Global Forecast to 2029

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Abstracts

The Post-Quantum Cryptography (PQC) market size is estimated to grow from USD 302.5 million in 2024 to USD 1,887.9 million by 2029 at a Compound Annual Growth Rate (CAGR) of 44.2% during the forecast period.

The main reason for implementing PQC is a direct threat from quantum computing, which can break encryption methods such as RSA (Rivest-Shamir-Adleman) and ECC (Elliptic curve cryptography) exponentially faster than classical computers. Requiring quantum-resistant cryptographic solutions to be implemented is considered a provision for compliance with developing regulatory requirements, such as requirements from the US National Institute of Standards and Technology.

In addition, organizations need to secure long-term fiscal and healthcare-related data from quantum decryption in the future. Very early adoption of PQC can bring competitive military advantages associated with commitment to information security and privacy. Further, technology partner relationships can help ease an organization's migration to quantum-safe cryptography through technology collaborations. For all these reasons, there has been an increasing need for PQC to be used in sensitive data protection to stay compliant.

'By Region, BFSI accounts for a larger market share.'

The BFSI sector is significantly different from others in the PQC market for several

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reasons. Stringent regulations like GDPR compel the use of advanced encryption to protect sensitive data and ensure compliance as one such reason. BFSI organizations must rely on PQC because financial data is the most valuable and has become very attractive to cybercriminals, making it a must-guarded item to retain customer trust.

Quantum Safe Hardware accounts for a larger market share by Solutions Segment.

Quantum-safe hardware is estimated to hold the largest market share in the PQC market. As quantum computing progresses, traditional cryptographic methods like RSA and ECC become vulnerable to quantum attacks. Quantum-safe hardware provides the foundational infrastructure needed to implement PQC algorithms effectively, making it indispensable for organizations looking to protect their data against future quantum threats. Hardware such as HSM (Hardware security modules) and TPM (Trusted Platform Module) Play a significant role in securing communication channels using QKD (Quantum Key Distribution) systems and QRNG (Quantum random number generators). Quantum-safe hardware is needed across multiple industries, including BFSI, healthcare, defense, and IT. This broad applicability ensures that quantum-safe hardware will be a central focus of PQC solutions, driving significant demand and market share.

By region, North America accounts for the highest market size during the forecast period.

North America, particularly the US, is leading in adopting PQC due to significant government initiatives and investments. US Agencies like the National Institute of Standards and Technology (NIST) have been at the forefront of standardizing PQC algorithms, driven by concerns over future quantum computing threats. The US & Canada government support accelerates regional research, development, and deployment. North American companies and research institutions are investing substantially in PQC research and development to stay ahead of emerging quantum threats. North America's robust technology ecosystem, including major tech firms and universities, fosters innovation in PQC, accelerating market growth and development.

Breakdown of primaries

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

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By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C-level – 40% and Managerial and Other Levels – 60%

By Region: North America – 50%, Europe – 25%, Asia Pacific – 20%, and Rest of the World – 5%

Major vendors in the PQC market include NXP Semiconductor (Netherlands), Thales (France), AWS (US), IDEMIA (France), Palo Alto Networks (US), DigiCert (US), Kloch (US), Post-Quantum (UK), PQ Shield (US), Entrust (US), IBM (US), Utimaco (Germany), Crypto Quantique (US), Crypto4A (Canada), CryptoNext (France), Qnu Labs (India), Qrypt (US), Enquantum (Israel), Xiphera (Finland), Sixscape (Singapore), Keyfactor (US), ResQuant (Poland), Rambus (US), Archon (British Virgin Island), Riscure (Netherlands).

The study includes an in-depth competitive analysis of the key players in the PQC market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the PQC market by solution, service, organization size, vertical, and region. It forecasts its size by Solution (Quantum-safe hardware, Quantum-resistant algorithms, Quantum-safe cryptographic libraries, Quantum-safe VPN, email service, messaging systems, Quantum-safe blockchain solutions, Quantum-safe authentication solutions, Quantum-resistant encryption products), By Service (consulting services, Migration services, Quantum risk assessment), By Organization Size (SME's and Large Enterprises), By Vertical (BFSI, government and Defense, Healthcare, IT & ITES, Retail and E-commerce, Other Verticals), By Region (North America, Europe, Asia Pacific, Rest of the World).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall PQC market and the

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subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers such as (Integration of Innovative Cryptographic algorithms, Hybrid PQC Mechanisms, Growing awareness of Cybersecurity and Data Privacy, Driving awareness toward Quantum Computing Threats); Restraints (High Implementation Costs in Solutions, Lack of Standardized algorithms); Opportunities (Early development of new products and service provides a competitive edge, Government and Defense Contracts, Migration to post-quantum cryptography) and Challenges (Significantly sizeable key size and implications on performance, Implementation Challenges, Difficulty in Encryption and Scalability, Vulnerabilities Due to Advancements in Quantum Technology).

Product Development/Innovation: Detailed insights on upcoming technologies, research development activities, new products, and service launches in the PQC market.

Market Development: Comprehensive information about lucrative markets – the report analyses the PQC market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the PQC market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players NXP Semiconductor (Netherlands), Thales (France), AWS (US), IDEMIA (France), Palo Alto Networks (US), DigiCert (US), Kloch (US), Post-Quantum (UK), PQ Shield (US), Entrust (US), IBM (US), Utimaco (Germany), Crypto Quantique (US), Crypto4A (Canada), CryptoNext (France), Qnu Labs (India), Qrypt (US), Enquantum (Israel), Xiphera (Finland), Sixscape (Singapore), Keyfactor (US), ResQuant (Poland), Rambus (US), Archon (British Virgin Island), Riscure (Netherlands) among others, in the PQC market strategies.

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