

Global study finds quantum industry deeply dependent on cross-border supply chains

Study finds most quantum companies rely on foreign suppliers and serve customers abroad in highly interconnected global industry

COLLEGE PARK, MD, UNITED STATES, September 23, 2026 /EINPresswire.com/ -- A new international survey of the quantum industry finds that the supply chains supporting quantum technologies are deeply global, with companies of every size relying on suppliers and customers across national borders. The survey included responses from 160 companies headquartered in 15 countries that reported suppliers in 36 countries, customers in 49 countries, and manufacturing locations in 25 countries.

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*Celia Merzbacher, QED-C
Executive Director*

The Global Quantum Supply Chain report maps where

quantum companies source inputs, manufacture components and systems and reach customers. The effort brought together the Quantum Economic Development Consortium (QED-C®), European Quantum Industry Consortium (QuIC), Quantum Industry Canada (QIC), UK Quantum, Japan's Quantum Strategic Industry Alliance for Revolution (Q-STAR), and Korea Quantum Industry Association (KQIA) with engagement across India's quantum ecosystem.

The study was undertaken to give policymakers and investors a clearer view of the cross-border relationships underpinning the emerging quantum economy. As quantum technologies move toward commercialization, companies need access to specialized suppliers and growing customer markets worldwide, while governments seek to protect critical technologies and strengthen supply-chain resilience.

Key findings include:

- 90% of respondents reported at least one foreign supplier.
- 74% reported at least one foreign customer.
- Respondents reported a median of three supplier countries and three customer countries.
- Component suppliers reported selling into more countries than quantum systems developers.
- Companies of every size, including those with fewer than 10 employees, reported buying from

suppliers and selling to customers in multiple countries.

□ The United States, Germany, the United Kingdom, Canada and Japan were the five locations most frequently named for both suppliers and customers.

“Quantum innovation does not stop at national borders, and neither do the supply chains that make it possible,” said Dr. Celia Merzbacher, Executive Director of QED-C, “As the industry scales, the report gives leaders and policymakers a clearer view of how deeply connected our ecosystem already is. With its recently expanded membership and new charter, ICQIA can use this shared evidence to strengthen international coordination, safeguard critical technologies and preserve trusted access to the necessary suppliers, customers and markets.”

“Quantum is inherently international across markets, standards, research, talent, capital and supply chains,” said Jonathan Legh-Smith, Executive Director of UKQuantum. “The report highlights this global interconnection and emphasises the need for practical cooperation between quantum nations, as set out in the inter-governmental Quantum Development Group’s April 2026 communique.”

“Taken as a bloc, the European Union is the second most frequent location of both suppliers and customers in this survey, which shows how much the global quantum industry already works with European companies. The survey also shows that the countries this industry buys from and the countries it sells to are not always the same, which is worth keeping in mind as Europe shapes its industrial and trade policy for quantum.” Cécile Perrault, Executive Director of the European Quantum Industry Consortium (QuIC)

“Quantum commercialization requires more than access to technology—it requires access to global markets,” said Dr. Brad Kim, Vice Chairman of the Korea Quantum Industry Association (KQIA). “For Korea, the priority is to help our companies contribute specialized capabilities and become trusted partners in global quantum supply chains. KQIA will work with fellow industry associations to translate this report’s findings into practical cooperation that expands market access, strengthens supply-chain resilience and protects critical technologies.”

“This study not only speaks to the interconnectedness of global quantum supply chains, but also makes clear the prominent role Canada’s quantum industry plays in this ecosystem. Quantum comprises a diverse set of technologies, and a strong Canadian position across those supply chains is critical for achieving our national security and resiliency objectives – and better understanding of the international ecosystem is essential to ensuring our growth alongside our trusted global partners,” said Sean Lee, Acting CEO of QIC.

“This study shows that the strength of the quantum industry will depend not only on national capability, but on how effectively those capabilities connect across borders,” said Abhishek Purohit, India Ecosystem liaison for the Global Quantum Supply Chain Study and Director of Technology Strategy at QURECA. “For emerging quantum economies such as India, this creates an important opportunity to contribute specialised capabilities, integrate more deeply into global

value chains, and become a trusted partner in the next phase of quantum commercialisation.”

The report's findings highlight the importance of policies that preserve access to markets and preferred suppliers in like-minded countries while protecting critical technologies. The data provides policymakers, investors, and other stakeholders with a clearer picture of the international relationships that support innovation and growth across the quantum sector.

About the survey

The Global Quantum Supply Chain Flows Survey was distributed in March and April 2026 to quantum companies in the United States, Canada, Europe, the United Kingdom, South Korea, Japan, and India. Respondents reported the country locations of their headquarters, suppliers, customers, and manufacturing associated with quantum components or systems, excluding widely available, easily substituted off-the-shelf parts. The survey did not collect company-identifying trade details.

A total of 160 companies met the study's inclusion criteria. Research organizations were not included. Companies headquartered in China were not represented among respondent headquarters, although they appeared in the data as a location named by respondents.

The full report is available at <https://8441224.hs-sites.com/global-quantum-supply-chain>

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