



GLOBAL QUANTUM SUPPLY CHAIN FLOWS

AN INTERNATIONAL SURVEY
OF THE QUANTUM INDUSTRY

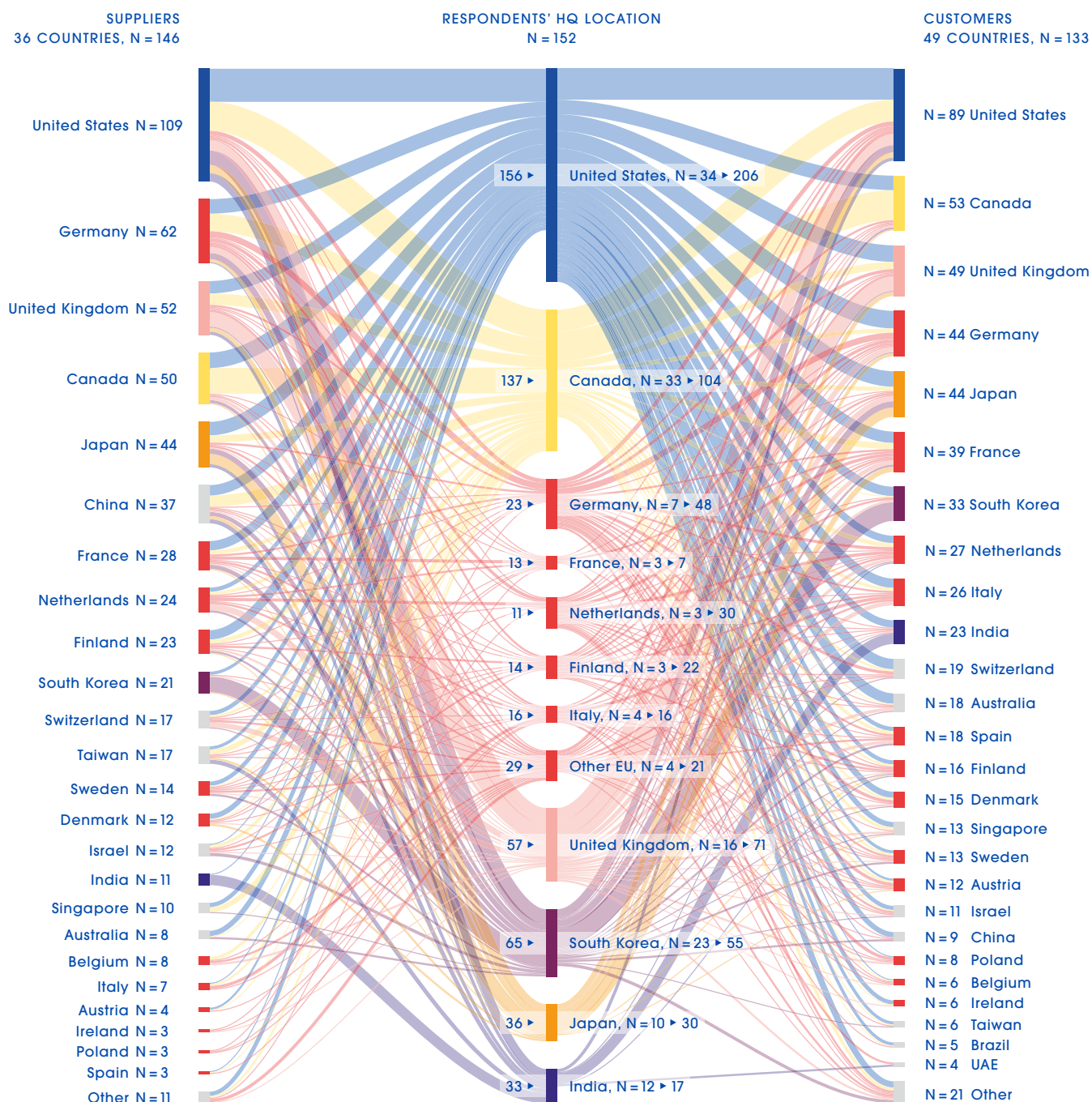
SEPTEMBER 2026



A new survey shows the quantum ecosystem of suppliers and customers is globally distributed: the vast majority of firms, regardless of size, source inputs from and sell products to multiple countries.

As the quantum industry grows, firms in the quantum ecosystem benefit from policies that allow access to markets and preferred suppliers based in like-minded countries. Controls on trade should protect flow of critical technologies while not hampering innovation and growth.

WHERE ARE YOUR SUPPLIERS AND CUSTOMERS OF QUANTUM COMPONENTS OR SYSTEMS LOCATED?

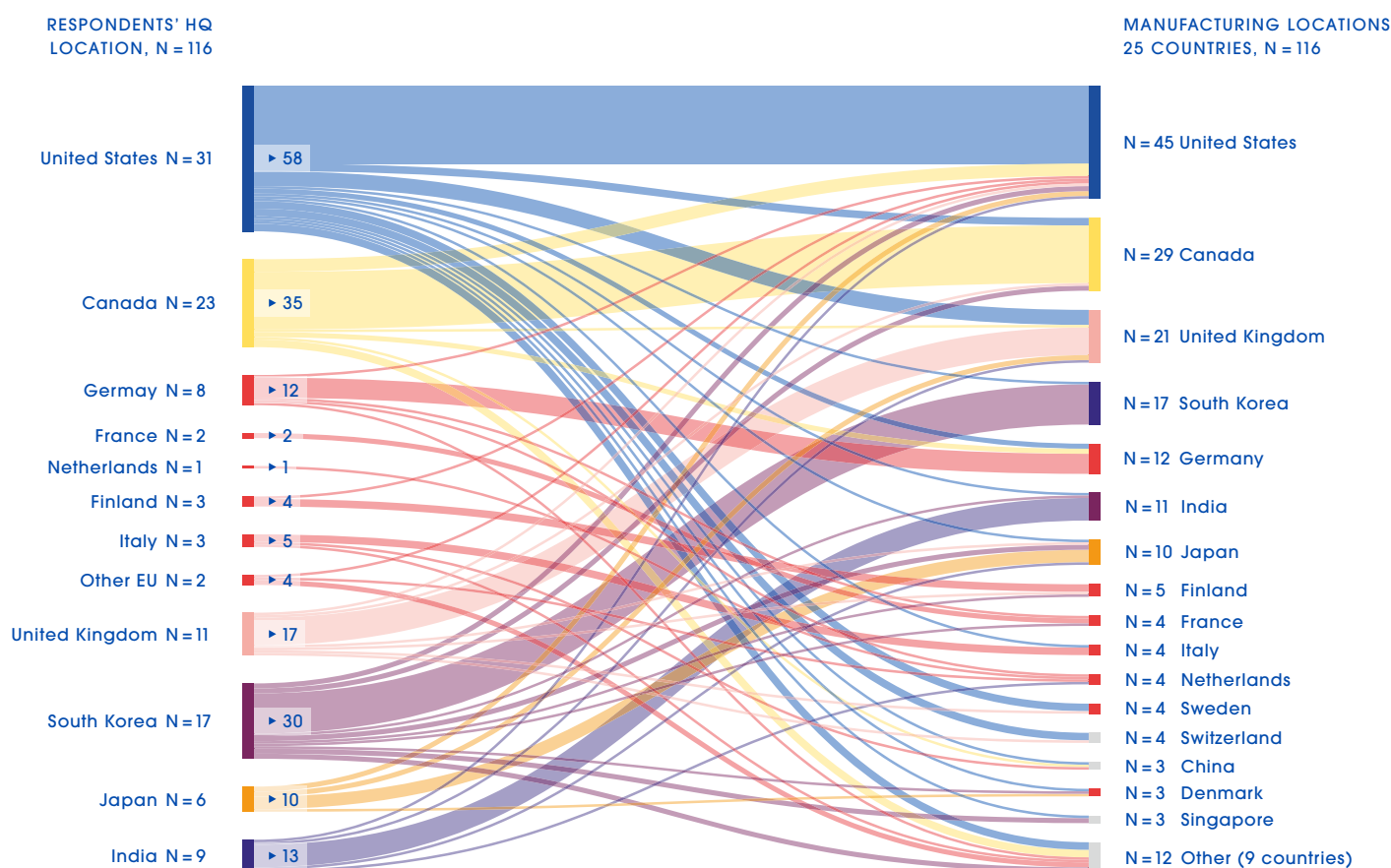


Middle column: respondent's headquarters (HQ) location. Left / right columns: country locations of suppliers and customers each respondent named. Line thickness = number of respondents from that HQ location that named a particular supplier (left) or customer country (right). N for HQ nodes = number of respondents headquartered there; N for a supplier or customer node = number of respondents who named that country. Beside each HQ node, the left number is the total supplier-country selections and the right number the total customer-country selections made by respondents headquartered there, each respondent contributing one per distinct country named. Countries named by two or fewer respondents are grouped into "Other."

- Respondents based in 15 countries had suppliers in 36 countries, customers in 49 countries, and manufacturing sites in 25 countries.
- Firms most often named their own country as supplier and customer but the majority also reported ties abroad: 90% reported at least one foreign supplier and 74% at least one foreign customer (median 3 supplier countries and 3 customer countries; see table below).
- The United States, Germany, the United Kingdom, Canada, and Japan were the most frequently named location of suppliers and customers. Taken as a bloc, the European Union is the second most frequently named location of suppliers and customers after the United States.
- China ranked 6th as a supplier location (37 respondents in 10 countries) but a customer for only 9 respondents.

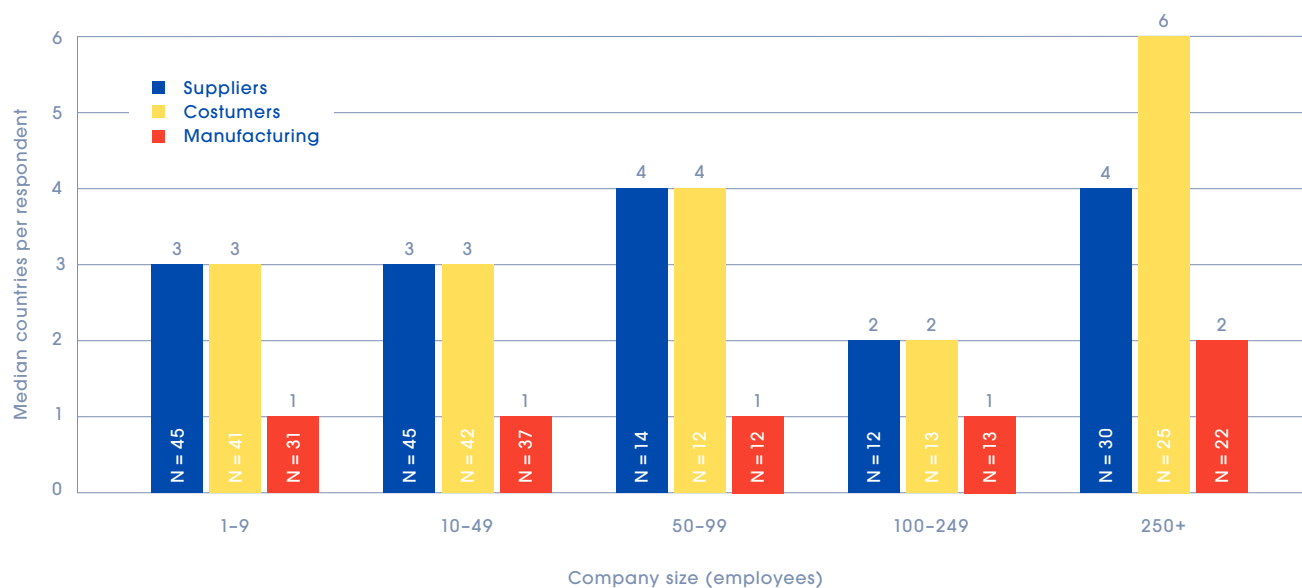
Number of countries reported as suppliers, customers, and manufacturing locations			
Metric	Suppliers	Customers	Manufacturing
Distinct countries named	36	49	25
Mean countries per respondent	4.1	4.8	1.7
Median countries per respondent	3	3	1
Range per respondent	1–16	1–20	1–9
Respondents represented	146	133	116

WHERE DOES YOUR COMPANY MANUFACTURE QUANTUM COMPONENTS OR QUANTUM SYSTEMS?



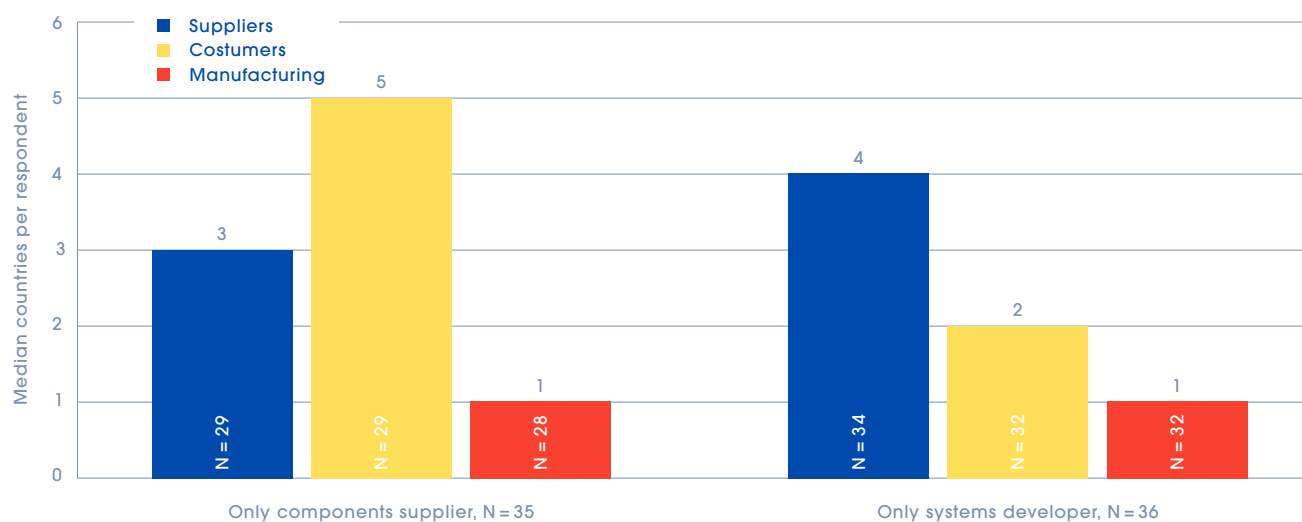
- Most companies manufacture solely in the country where they are headquartered, although several respondents have manufacturing locations in multiple countries (see table above).

COUNTRY TIES BY COMPANY SIZE



- Larger companies (250+ employees) tend to sell into more countries than smaller ones, consistent with scale enabling broader reach.
- Notably, even the smallest firms (1-9 employees) buy from suppliers and sell to customers in multiple countries, showing that quantum supply chains are globally distributed across all company sizes.

COUNTRY TIES BY TYPE OF BUSINESS



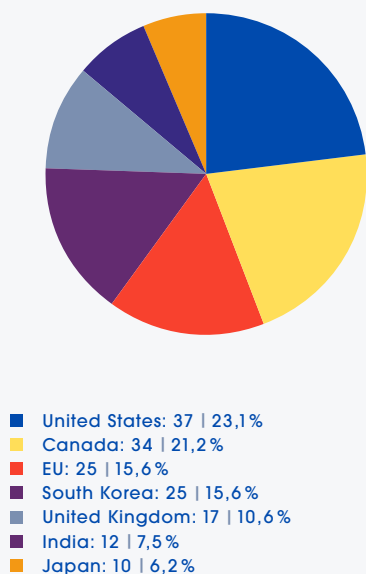
Respondents could report themselves as developers of both components and systems; this figure includes only those that identified as exclusively one or the other.

- Quantum component suppliers report selling into more countries than quantum systems developers, reflecting their different commercial maturity: components already have an established customer base – quantum companies themselves – while quantum systems remain largely pre-commercial, with end-user markets still emerging.

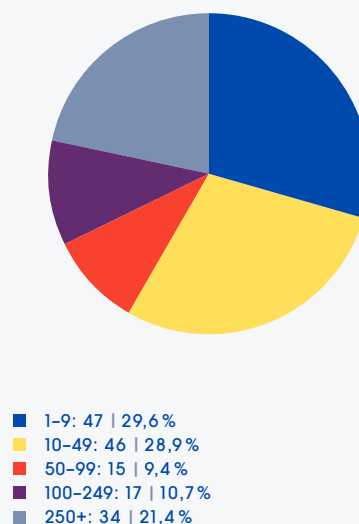
RESPONDENT BREAKDOWN BY HQ LOCATION, COMPANY SIZE, NATURE OF BUSINESS, AND INDUSTRY SEGMENT

HQ and employee size questions were single-choice, so their slices are mutually exclusive. Nature of business and industry segment questions were multi-select, so one respondent can appear in several slices.

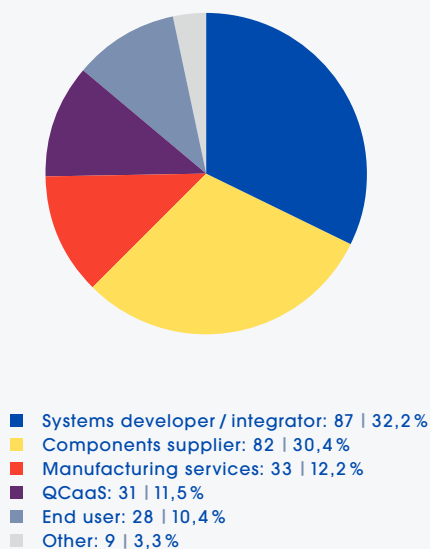
HQ Distribution



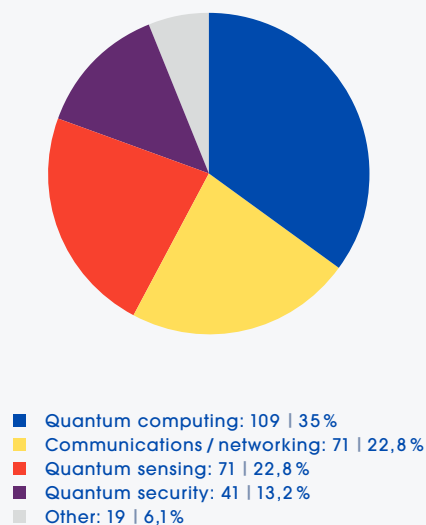
Employee-size distribution



Nature of business (multiple selection)



Industry segment (multiple selection)



ANALYSIS CAVEATS

Two countries with substantial quantum ecosystems are absent from the respondent pool: China, whose organizations were not invited, and Australia, whose industry consortium (Quantum Australia) was unable to participate. Both still appear in the data, however, as suppliers, customers, or manufacturing locations named by respondents.

Respondents reported the country locations of their suppliers, customers, and manufacturing of quantum *components* (hardware or software used to build quantum systems, such as materials, electronics, lasers, optics, cryogenics, etc., which may also have non-quantum uses) and quantum *systems* (quantum-enabled systems for applications such as computing, sensing, communications, and security). They were explicitly asked to exclude off-the-shelf parts that are widely available and easily substituted. Respondents did *not* report the number of suppliers or customers per country, specific inputs exchanged, or volumes traded. This study was intentionally kept at a nonproprietary level to maximize response rate.

METHODOLOGY

The Global Quantum Supply Chain Flows Survey mapped the international linkages of the quantum industry by collecting the country locations of companies' headquarters, suppliers, manufacturers, and customers. It was distributed in March–April 2026 to the members of quantum industry organizations anchored in seven countries / regions: the United States (Quantum Economic Development Consortium, QED-C), Canada (Quantum Industry Canada, QIC), Europe (Quantum Industry Consortium, QuIC), the United Kingdom (UK Quantum), South Korea (Korea Quantum Industry Association, KQIA), Japan (Quantum STRategic industry Alliance for Revolution, Q-STAR), and India.

160 respondents met the inclusion criteria – companies buying or selling quantum components or systems, providing manufacturing-related services such as fabrication or testing, or offering quantum-system access as a service – and answered at least one of the three questions about the country locations of their suppliers, customers, and manufacturing operations. Participating consortia estimate this sample represents about two thirds of their total pool of members that would be eligible to answer the survey. The sample is well distributed across HQ countries, company sizes, and technology segments. Note research organizations are not included in this sample.