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2024 Global Overview of Investment and Financing in the Quantum Field

April, 2025

Introduction

Quantum technology, as a cutting-edge field of global strategic competition, has an investment and financing landscape that profoundly reflects the innovation capabilities and industrial competition directions of various countries. This report is based on data from 2024 and systematically reviews the current status of investment and financing in the global quantum field, with a focus on three core dimensions: the strategic positioning of government investment, the stage characteristics of social capital, and the geographical distribution and basic overview of investment institutions. By integrating government investment, investment trends, and company dynamics, it reveals the capital driven logic behind the development of quantum technology, providing decision-making references for policymakers, investors, and practitioners.

The highlight of this report is the first-time inclusion of analysis on government investment and investment institutions. In terms of government investment, for the first time, government investment and social financing behavior have been incorporated into a unified analytical framework. It not only introduces the strategies of major economies such as China, Europe, and the United States in shaping technological sovereignty through public finance but also analyzes the complete path of social capital from early incubation to commercialization. Regarding investment institutions, for the first time, the dynamics of active global quantum investment institutions in 2024 have been analyzed, including the proportion of institutions with government backgrounds and the investment activities of each institution. Additionally, the report compares the social financing activities of China and the United States in the three major quantum fields and provides in-depth analysis.

Through cross-verification of multidimensional data, this report provides a new perspective for understanding the capital code in the industrialization process of quantum technology.

The Definitions of Government Investment, Social Financing, Investment Institutions and Quantum Safe.

This report focuses on the investment and financing dynamics in the quantum field in 2024, covering the quantum-related investments made by governments worldwide in that year, as well as data on investment institutions that were active globally in 2024.

▶Government Investment

In terms of government investment, this report has tallied the projects that governments participated in and the investment-related policies they issued in 2024. It has also categorized the investment duration and scale, eliminated duplicate projects, and ultimately conducted a quantitative analysis.

▶Social Financing

In terms of social financing, given that some companies are involved in multiple quantum fields leading to overlapping investment amounts, this report has reduced the relevant investment and financing activities and conducted a quantitative analysis of social financing activities in different quantum fields and regions respectively.

▶Investment Institutions

In terms of investment institutions, this report has categorized and summarized the investment institutions that were active in 2024 by region, selected those that made multiple investments, conducted a quantitative analysis of these institutions by region and funding round, and provided detailed introductions of them.

The Definitions of Government Investment, Social Financing, Investment Institutions and Quantum Safe.

▶Quantum Safe

Quantum safe refers to the measures taken to counter the threats posed by quantum computing, encompassing both physical and mathematical technical approaches. The physical technology pertains to quantum secure communication（QCmm）, which includes Quantum Key Distribution (QKD), Quantum Random Number Generators (QRNG), Quantum Teleportation (QT), and others. The mathematical technology is centered around Post-Quantum Cryptography (PQC), which builds cryptographic safety algorithms, and extends to various aspects such as quantum digital signatures and the application of quantum computers in the field of safe.

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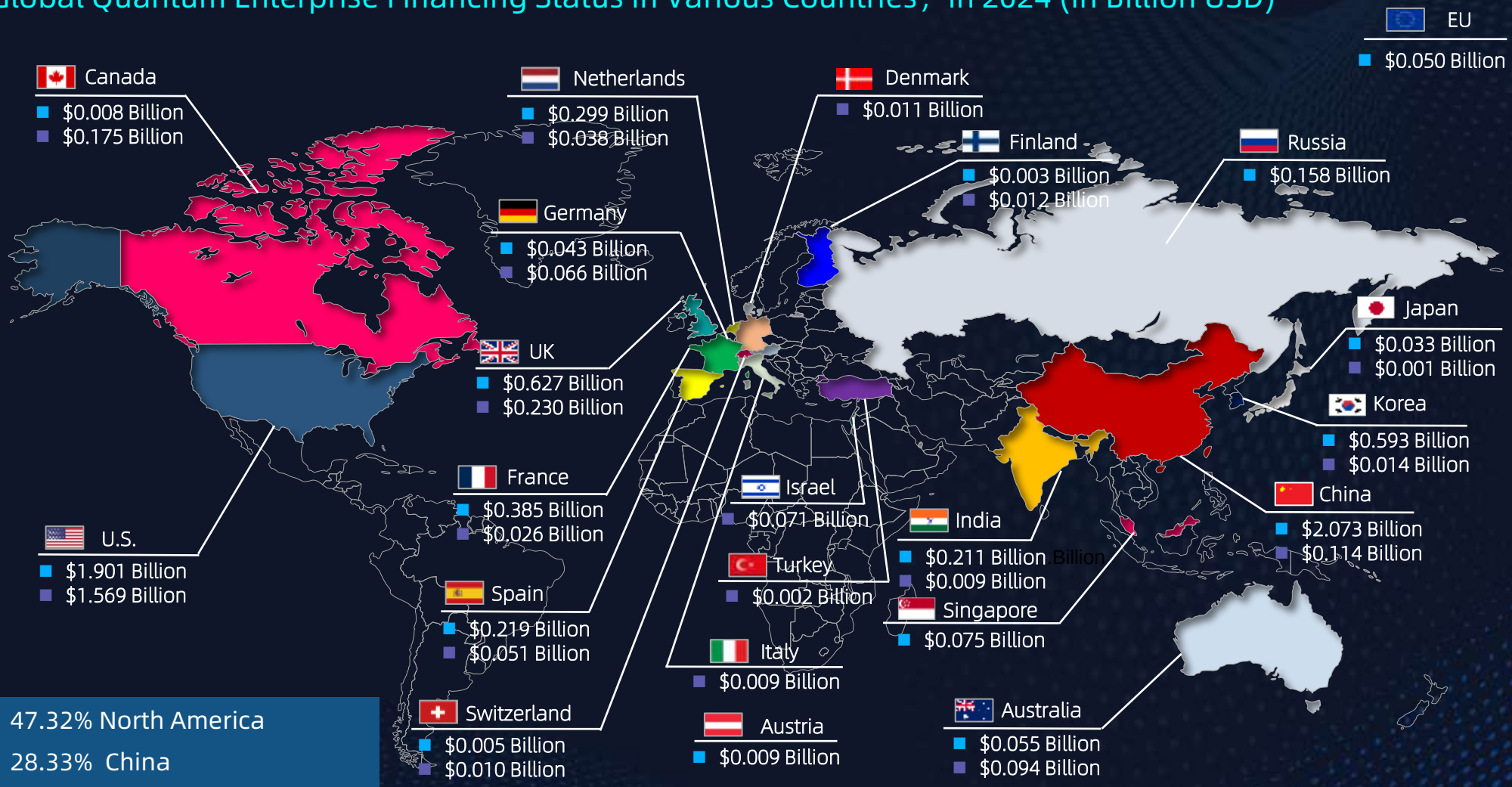
PART ONE

Global Overall Investment and Financing Situation

The Overall Global Investment in Quantum Technology in 2024, Covering Both Government Funding and Social Financing.

Global Quantum Enterprise Financing Status in Various Countries， in 2024 (in Billion USD)



47.32% North America

28.33% China

21.15% Europe

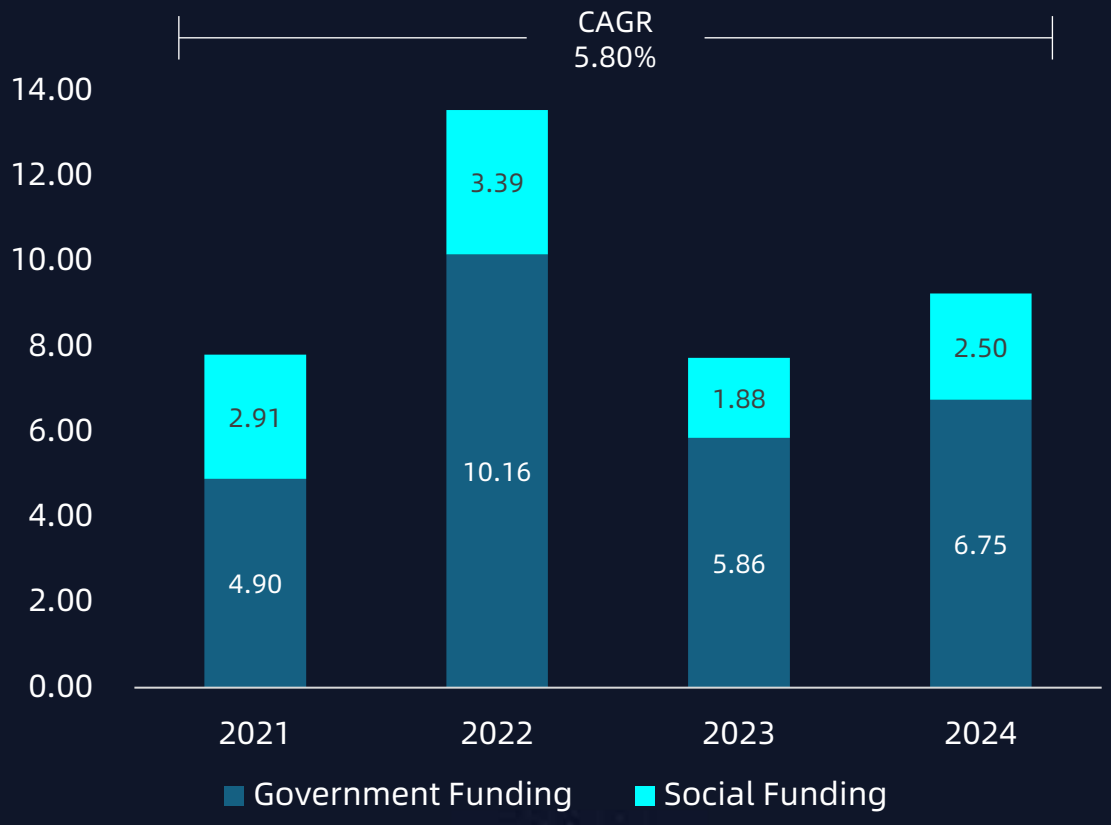
3.20% Asia-Pacific (ex-China)

Government Funding

Social Financing

In the Quantum Field, Government Investment Holds a Dominant Position.

Global Overall Investment Amount, 2021-2024 (in Billion USD)



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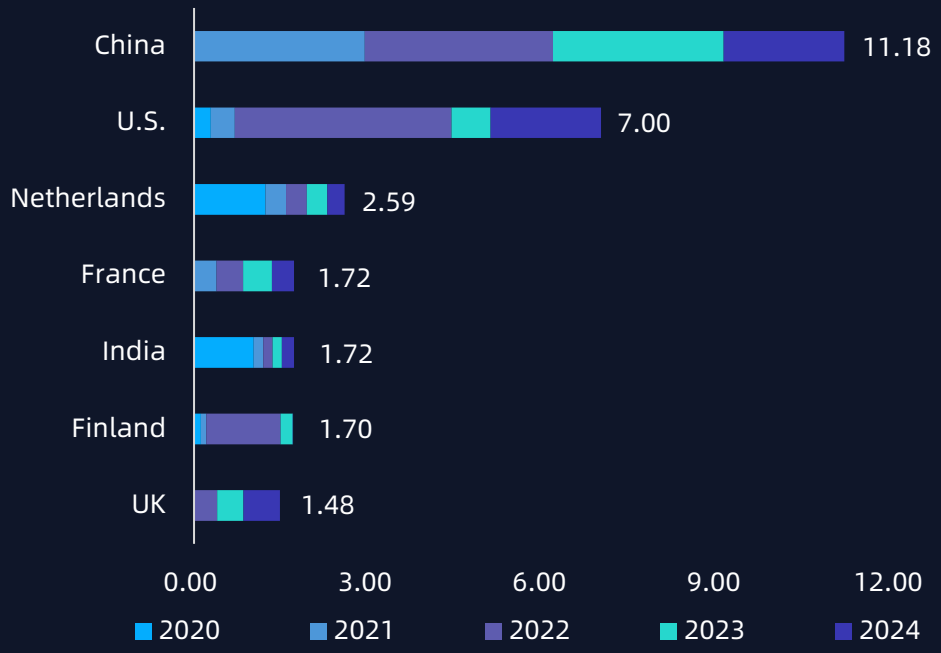
- From 2021 to 2024, global investment and financing reached its peak in 2022. Among them, global government investment reached 10.16 billion US dollars, and social financing reached 3.39 billion US dollars.
- From different types of investment, government funding has consistently accounted for a higher proportion each year. On the one hand, this indicates that the government has played a crucial role in guiding industrial development and has been able to directly propel the advancement of the quantum field, with government funds often being a vital source for initial startup and key technological support. On the other hand, it reflects a lack of market confidence or higher perceived risks in certain areas, with the market still in a relatively cautious state.

In Terms of Government Investment, China Has Ranked First Globally for Two Consecutive Years， Followed by North America.

Government Investment in the Quantum Field of Major Countries, 2020-2024 (in Billion USD)



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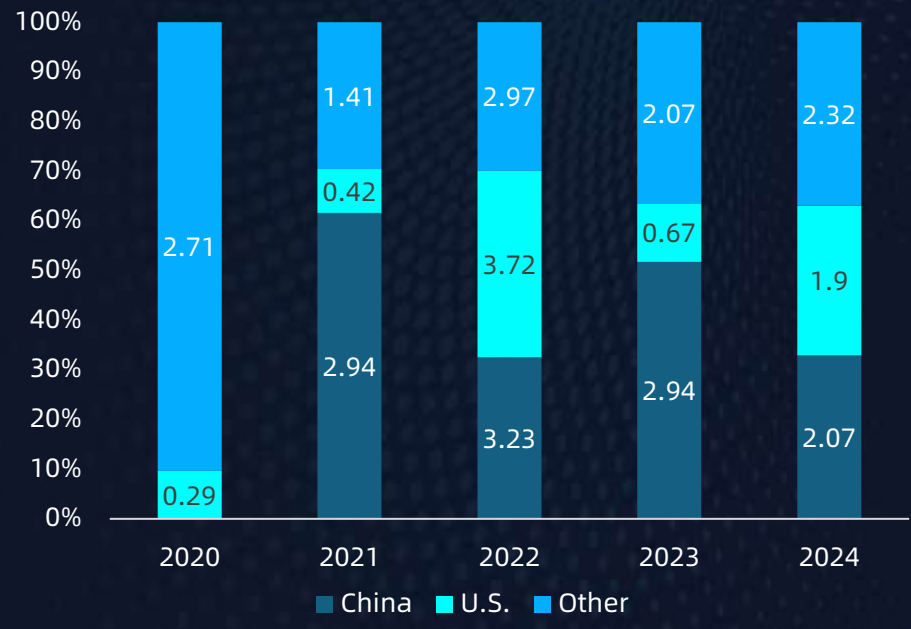
Distribution of Overall Financing Between China and the United States, 2020-2024 （in Billion USD)



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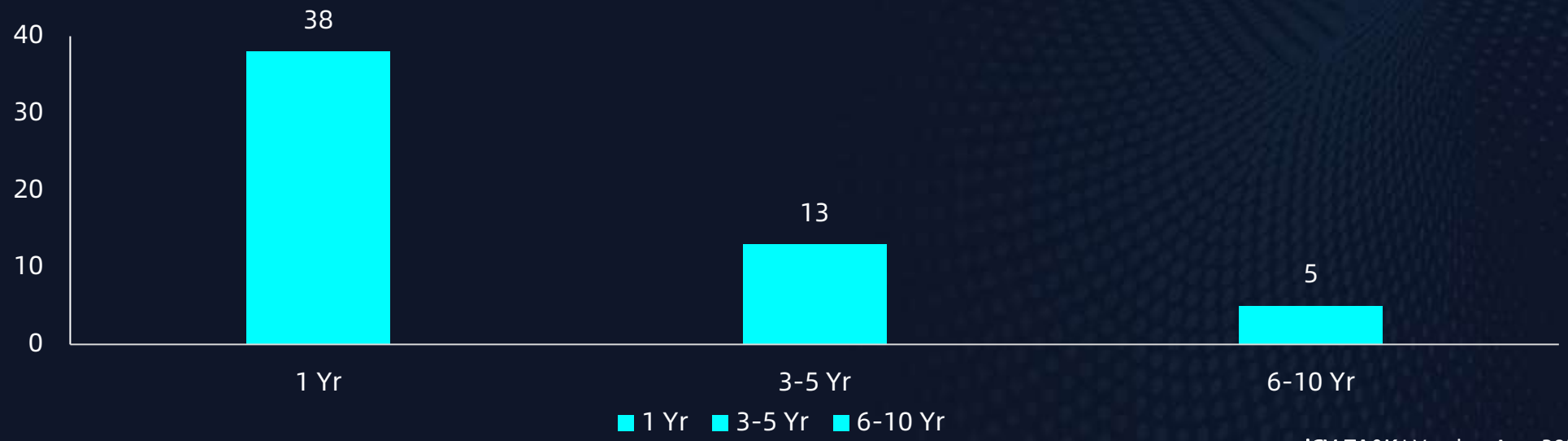
- From 2020 to 2024, the total global government investment in quantum technology is approximately $30.69 billion. Among them, Chinese has the highest government investment, about 11.18 billion; the United States is second, with a government investment of approximately $7.00 billion.
- In terms of government investment, China’s average annual input is significantly higher than that of the United States. Through sustained funding, China has gained a clear first-mover advantage.

The Imbalanced Investment Term Structure of Governments Around the World in the Quantum Field Is Highlighted.

Distribution of Global Government Investment Project Deadlines in 2024



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- From the distribution of government investment project terms, short-term (1-year) projects have the highest number, totaling 38, accounting for approximately 68%; 13 medium to long-term (3-5 years) projects, accounting for 23%; There are only 5 long-term (6-10 years) projects, accounting for 9%. The data shows that government investment is more concentrated in short-term effective areas, which may be related to needs such as livelihood security and infrastructure maintenance, but the reserves of medium - and long-term projects are relatively weak.
- The decrease in the number of medium and long-term projects reflects insufficient investment in cross cycle planning. Such projects usually involve industrial upgrading or regional coordinated development, and a small number may affect policy continuity. The scarcity of long-term projects highlights the limited investment in strategic areas such as basic scientific research and core technology breakthroughs. Such projects have long cycles and high risks, but they are related to the development momentum.

The Top Five Global Government Quantum Investment Projects in 2024 Focus on Europe and America.

Top Five Global Government Investment Projects in Quantum Technology in 2024

Policy or Report	Country	Investment Amount	Investment Content	Term of Investment
Illinois governor proposes $500M for quantum technologies in new budget	U.S.	$500.00 M	New budget allocation for quantum technology	1 Yr
Defense Quantum Acceleration Act	U.S.	[illegible]	Accelerate the adoption of quantum technology research by the US Department of Defense and promote the practical application of quantum computers	1 Yr
Joint Declaration of Intent	UK, Germany	[illegible]	Expand and deepen the connection between science and research	1 Yr
PROQCIMA	France	[illegible]	Implementing the French Quantum Strategy and PROQCIMA Program	[illegible]
National Quantum Initiative Reauthorization Act	U.S.	[illegible]	Extend investment term to promote the development of federal scientific institutions and government funded research centers	[illegible]

Note: The investment amount has been converted based on the current year.

[illegible]

Global Social Financing Shows Significant Regional Concentration Characteristics.

Global Social Financing in the Quantum Field, 2021-2024 (in Billion USD)

Global Social Financing in the Quantum Field by Various Countries in 2024 (in Billion USD)

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- Overall, social financing is highly concentrated regionally. North America leads with $1.74 billion (69.7%), followed by Europe at $530 million (21%). China ($110 million) and other Asia-Pacific regions ($120 million) have a combined share of less than 10%, showing relatively low financing activity.
- By country, China's social financing has declined yearly, reflecting cautious investment in the quantum industry and insufficient financing scale from emerging industries to offset the decline in traditional sectors. In contrast, the cyclical nature of U.S. social financing indicates a relatively stable industrial structure compared to other nations.

Financing Landscape in Quantum Technology, Multi-faceted Features Reflecting Robust Industry Growth.

2024 Global Quantum Field Social Financing Rounds Overview (in Million USD, Pin)

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- In terms of financing rounds, early-stage financing is active, with 20 Series A and 16 seed/angel rounds. This shows many emerging quantum tech enterprises are in their startup phase, attracting substantial early investment, indicating high innovation vitality and the continuous emergence of new business models and technologies.
- The appearance of Series B and C rounds means some enterprises, after early growth, are gaining market recognition and entering expansion and maturity stages, which helps them enhance technological strength, expand market share, and drive industry development.

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PART TWO

Investment and Financing Situation in Different Regions and Quantum Technology Fields

In 2024, the Total Social Financing in North America Accounted for Nearly 70% of the Global Total.

2024 Social Financing Situation of the Three Major Sub Industries of the Global Quantum Industry by Region (in Billion USD, %)

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Note: Due to some enterprises' involvement in multiple quantum fields, investment amounts overlap. For instance, Quantum Corridor operates in quantum computing and quantum safe, while Qubitrium is active in quantum safe and quantum sensing.

North America Leads in Social Financing for Quantum Computing and Sensing, While Europe Does in Quantum Safe.

Proportion of Global Regions in the Three Major Segmented Quantum Fields in 2024 (in Billion USD, %)

Region	Characteristics
North America	• Quantum computing and sensing investments are both the highest
Europe	• Compared to other regions, the quantum safe sector has the highest investment
China	• The investment in these three areas is relatively balanced, with the safe sector being more prominent
Asia-Pacific (ex-China)	• The levels in all three fields are relatively low, especially in the sensing field

Although the Investment Scale for Quantum Safe is Still Limited, PQC Has Become a Key Investment Area.

Global Distribution of Social Financing in the Three Major Quantum Fields in 2024 (in millions USD, %)

- In 2024, the global investment and financing activity in the field of quantum safe is average, the financing scale is limited, and the industry development is still in its infancy. In the field of quantum cryptography, four companies have received financing, accounting for 18% of the quantum safe sector. Specifically, it includes PQShield, American Binary, SEALSQ, and Micro Innovation. From the perspective of segmented fields, in 2024, the main investment will be in PQC, with PQShield in the UK and Micro Innovation in China receiving $7 million and $5 million respectively, with a relatively high proportion of investment.
- In the field of quantum computing, the main investment in 2024 will be in quantum computing hardware, and the research and manufacturing in this area have attracted a large amount of social capital injection. In the field of quantum sensing, the main investment in 2024 will be in other technological paths, such as Optomechanics, with a total financing amount of approximately $12 million.

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The U.S. Emphasizes on Quantum Computing and Sensing, While China Has a High Investment Proportion in Quantum Safe.

Distribution of social financing in the three major quantum fields in China and the United States in 2024 (in Billion USD, %)

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- In the comparison of investment in the quantum field between China and the United States, the United States places more emphasis on quantum computing, followed by quantum sensing, while China has the highest proportion of investment in the field of quantum communication in the world. The strong investment of the United States in the field of quantum computing reflects its market-driven capital allocation model, and quantum computing attracts a large amount of capital due to its potential revolutionary computing capabilities. In contrast, China's investment in the field of quantum communication accounts for about 25% of the world's total, thanks to the government-guided investment model, policy support, and national security needs that have driven the key development of this field.

U.S. Funding in Quantum Computing Significantly Outpaces China, While China Slightly Surpasses the U.S. in Quantum Safe.

A Comparative Analysis of Social Financing in Three Major Quantum Fields Between the U.S. and China in 2024 （in Billion USD）

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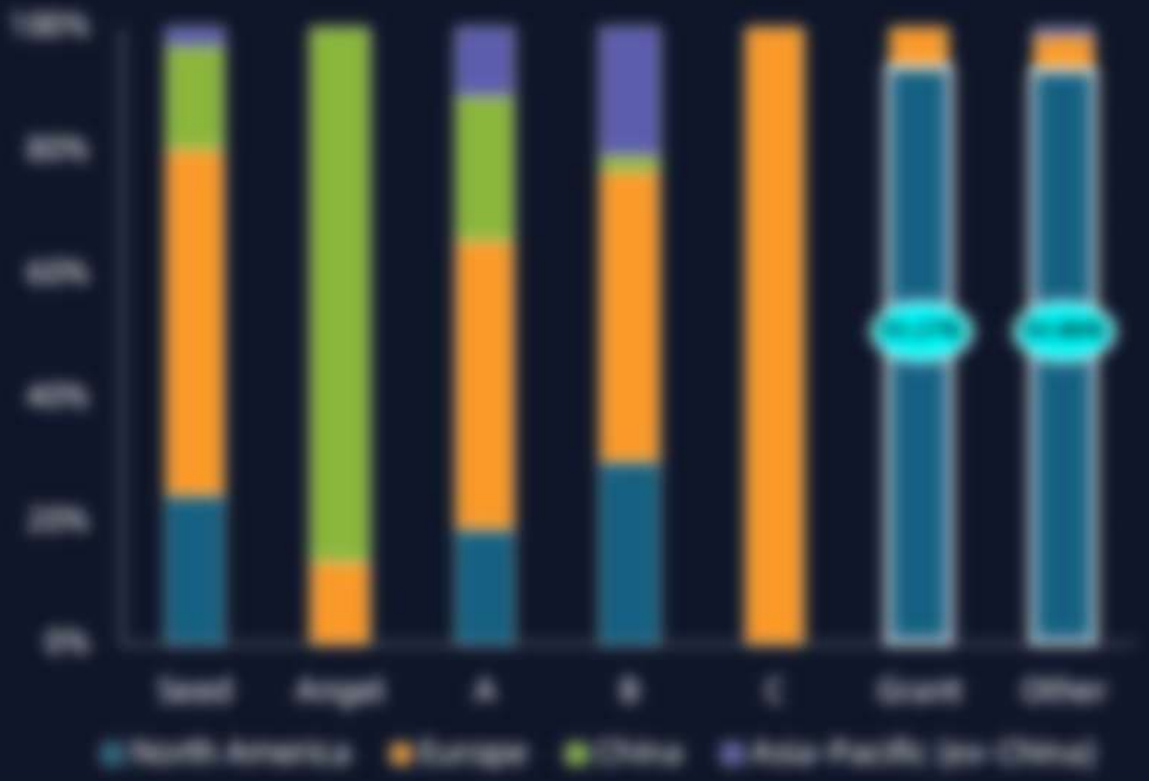
- There are differences in investment priorities between China and the United States in quantum computing and quantum security. In the field of quantum computing, the US investment accounts for 79.79%, while China's investment accounts for 40.79%; in the field of quantum security, the US investment accounts for 0.79%, while China's investment accounts for 26.32%. In short, the United States' investment in the field of quantum computing far exceeds that of China, demonstrating its pursuit of computing. China's financing in the field of quantum security is ahead of the United States, thanks to the Chinese government's strong investment in quantum information science research and development, as well as its long-term strategic layout in quantum communication.

North American Social Financing is Led by Government and Enterprises, with China Focusing on Early Stages of Financing.

2024 Global Quantum Field Social Financing Rounds Overview by Region (unit: %)



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- From the distribution of financing rounds, North America is dominated by government funding and corporate strategic investment, accounting for 86.4% of the total financing in the region, but the blank of C round and above financing shows that the participation of market capital is insufficient in the later stage. Europe presents A balanced layout, with continuous coverage of round A, Round B and round C, forming a complete investment chain, but the angel round is only 1.8X million US dollars, and there are shortcomings in the early ecology.
- China focused on the early stage, the seed round, the angel round and the A round accounted for more than 90%, but the financing after the B round fell to 130 million, and the technology commercialization capability was to be broken through. Asia-Pacific (excluding China) is concentrated in Series A and B, but the seed round and later stage support are lacking, and regional synergies have not yet formed.

Startups Are Active in Seed and Series A, and Government Grants and Other Financing Provide Strong Support for Innovation.

- In 2024, North American social financing activity was characterized by four rounds of Seed financing and four rounds of Series A financing, indicating active start-up financing.
- However, there were only two rounds of Series B financing, while Angel and Series C rounds did not occur or showed cautious investment. In terms of financing amounts, Grant and other types of financing dominated, with amounts of $6.375 million and $4.36 million respectively.
- This highlights the significant role of government support and other forms of financing in entrepreneurship and innovation. Meanwhile, the amounts for Seed and Series A rounds were relatively low, which reflects the funding challenges faced by start-ups in their early stages.

North American Corporate Financing in the Field of Quantum Technology, in 2024 (in Million US$, Pie)

IDTechEx | Version Plan: 2025

Startups Are Active in Early Financing but Face Challenges and Uncertainties in Subsequent Stages.

- From the perspective of financing rounds, there were [illegible] Seed rounds and [illegible] Series A rounds of financing in the European region in 2024, which shows the strong demand for early financing of start-ups.
- There was only 1 Angel round, 2 Series B rounds, and 1 Series C round, indicating that there were fewer activities in the Angel round and subsequent financing stages. This may be because investors were more cautious or had limited options. In addition, there were eight grants and four other funding rounds, respectively, reflecting the support for entrepreneurship from government and non-traditional sources.
- In terms of financing amount, Series A was the highest, indicating that enterprises at this stage were recognized by the market and needed more funds for development.

European Corporate Financing in the Field of Quantum Technology in 2024 (in Million USD, Pie)

[illegible]

Financing Activities Are Concentrated in Series A, with Grant and Other Channels Playing a Limited Role.

- From the perspective of financing rounds, the Series A round of financing in China in 2024 was the most active, with a total of six rounds. This indicates that enterprises have received more financial support or have passed the initial stage to seek expansion.
- The Seed and Angel rounds each had two rounds, indicating that start-ups have obtained a certain amount of financing in the early stage, but it is more limited than the Series A round.
- There was only one Series B round and no financing in the Series C round, reflecting that investors were more cautious or there were fewer qualified enterprises in the subsequent financing stage. In addition, neither Grant nor other financing occurred, suggesting that government grants and non-traditional sources had a limited role or did not occur.

Chinese Corporate Financing in the Field of Quantum Technology, in 2024 (in Million USD, Fin.)

IDTechEx | Version Plus: 2025

Social Financing is Mainly Focused on Series A and B Stages, with Fewer Activities in Early and Late Expansion Stages.

- From the perspective of financing rounds, the Series A round of financing in the Asia-Pacific region (excluding China) in 2024 was more active, with a total of four rounds. This indicates that enterprises have received financial support or are in a period of rapid development.
- The Series B round of financing had two rounds, indicating that some enterprises in the expansion stage also received funds. In contrast, there was only one Seed round, and no financing in the Angel or Series C rounds, reflecting limited financing activities or investor caution in the start-up and late expansion stages.
- Additionally, there was one Other type of financing, but no Grant financing occurred. This suggests that other non-traditional channels played a certain role, while government subsidies either did not occur or had a limited role during the statistical period.

Asia-Pacific (ex-China) Corporate Financing in the Field of Quantum Technology, in 2024 (in Million USD, Pie)

IDTechEx | Version May, 2025

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PART THREE

Regional Analysis of Investment Institutions

Global Investment Is Mainly Concentrated in North America and Europe, and China Is Also an Important Region.

Number of Institutions with Investment Activity by Region, in 2024

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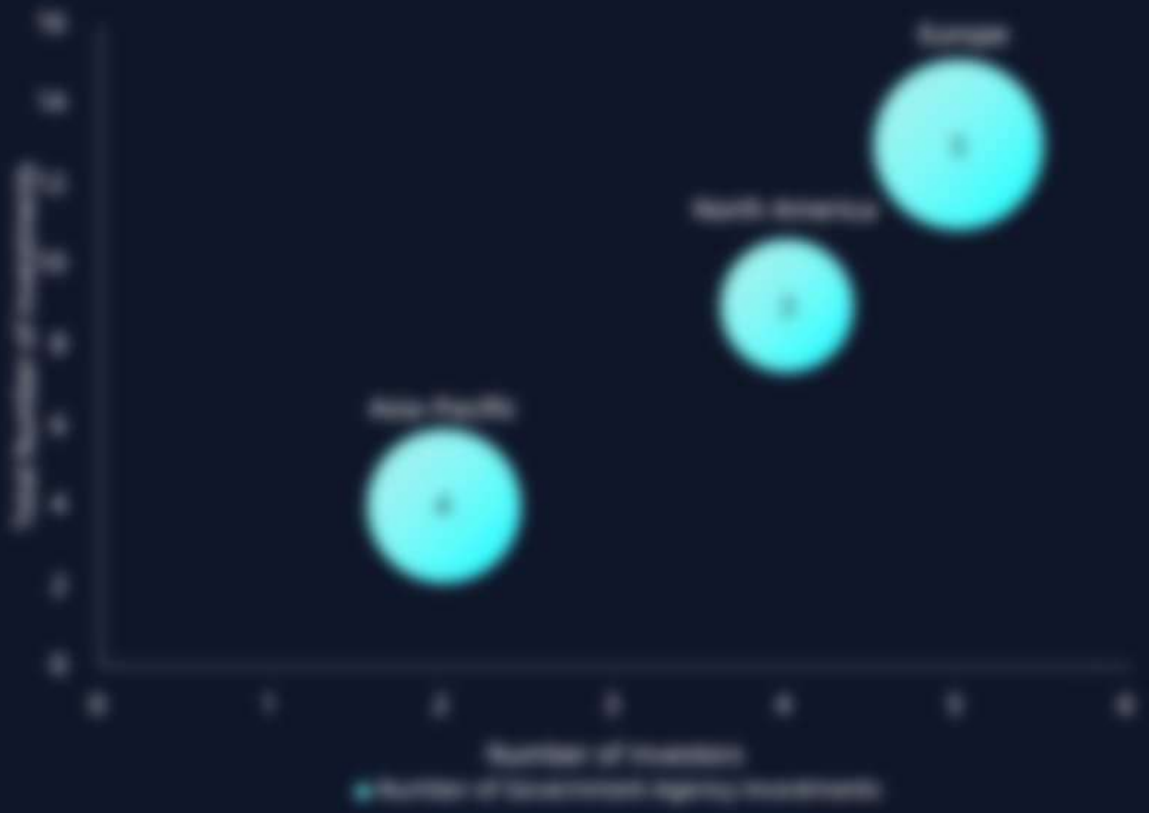
- In terms of regional distribution, North America has the highest number of investment institutions, reaching 54, demonstrating the region's activity and importance in global investment activities.
- The European region is close behind, with 51 investment institutions participating in investment activities, indicating that Europe is also an important region for global investment.
- There are 32 investment institutions in the region, demonstrating China's prominent position in the global investment landscape, although slightly fewer than North America and Europe, but still considerable influence.
- There are 15 investment institutions in the Asia-Pacific region (excluding China), indicating that there is some investment activity in the region, but it is more limited compared to other regions. The absence of investment institutions in other regions may reflect their relative inactivity or lack of statistical coverage.

Government Support for Quantum Technologies is Key, but Market Mechanisms Are Also Essential for a Good Investment Climate.

The Geographical Location of Global Investment Institutions and the Distribution of Government Investment Institutions, in 2024



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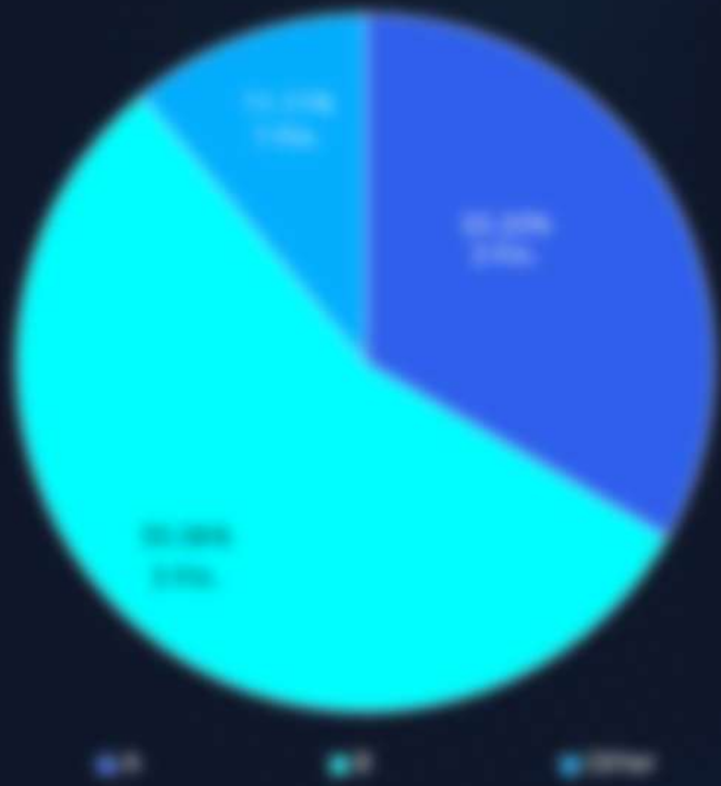
- In the left figure, the number of investment institutions with more than one investment frequency in 2024 is selected for display, where the horizontal coordinate is the number of institutions participating in quantum-related investment in each region, the vertical coordinate is the total investment frequency of investment institutions in the region, and the circle size represents the frequency of investment by government institutions.
- As can be seen from the figure, the highest investment frequency of European institutions is 13 times, and that of government institutions is 5 times. The frequency of institutional investment in North America is 8 times, and the frequency of government investment is 3 times.
- The frequency of institutional investment in the Asia-Pacific region is 4 times, all of which are government institutional investment.

Investors in North America Are More Likely to Invest in Series B Companies in the Expansion Phase in 2024.

Number of investment rounds by North American investment institutions (unit: Pcs., %)



In-Q-Tel Is the Most Active and Largest Investor in North America, with Investments in All Three Quantum Sectors.

In-Q-Tel (IQT), founded as a nonprofit strategic investment institution by the CIA in 1999, aims to enhance the national security and economic development of the US and its allies by driving cutting-edge private-sector technologies into the public sector. Over 25 years, it has focused on helping startups tailor their innovations to suit government partners' needs while boosting their commercialization potential.

Details of IN-Q-Tel Investment activities In 2024

Sequoia Capital Invests Primarily in the Field of Quantum Computing, with a Total of Two Investment Activities in 2024.

Sequoia Capital was founded in Silicon Valley, USA in 1972. Sequoia, as the first institutional investor, invested in companies such as Apple, Google, Cisco, Oracle, Yahoo, LinkedIn and many other innovative companies. Sequoia Capital has localized funds in the United States, China, and India. Since its establishment, Sequoia Capital has invested in over 500 companies across technology, media, healthcare, services, and other fields.

Details of Sequoia Capital Investment activities In 2024

Cerberus Capital Invests Primarily in Series B Quantum Computing Companies.

Cerberus is a trusted partner to respected investors worldwide in credit, private equity, and real estate. For more than three decades, it has provided capital solutions and operating experience to help companies and properties around the world improve performance and drive value creation.

Details of Cerberus Investment activities In 2024

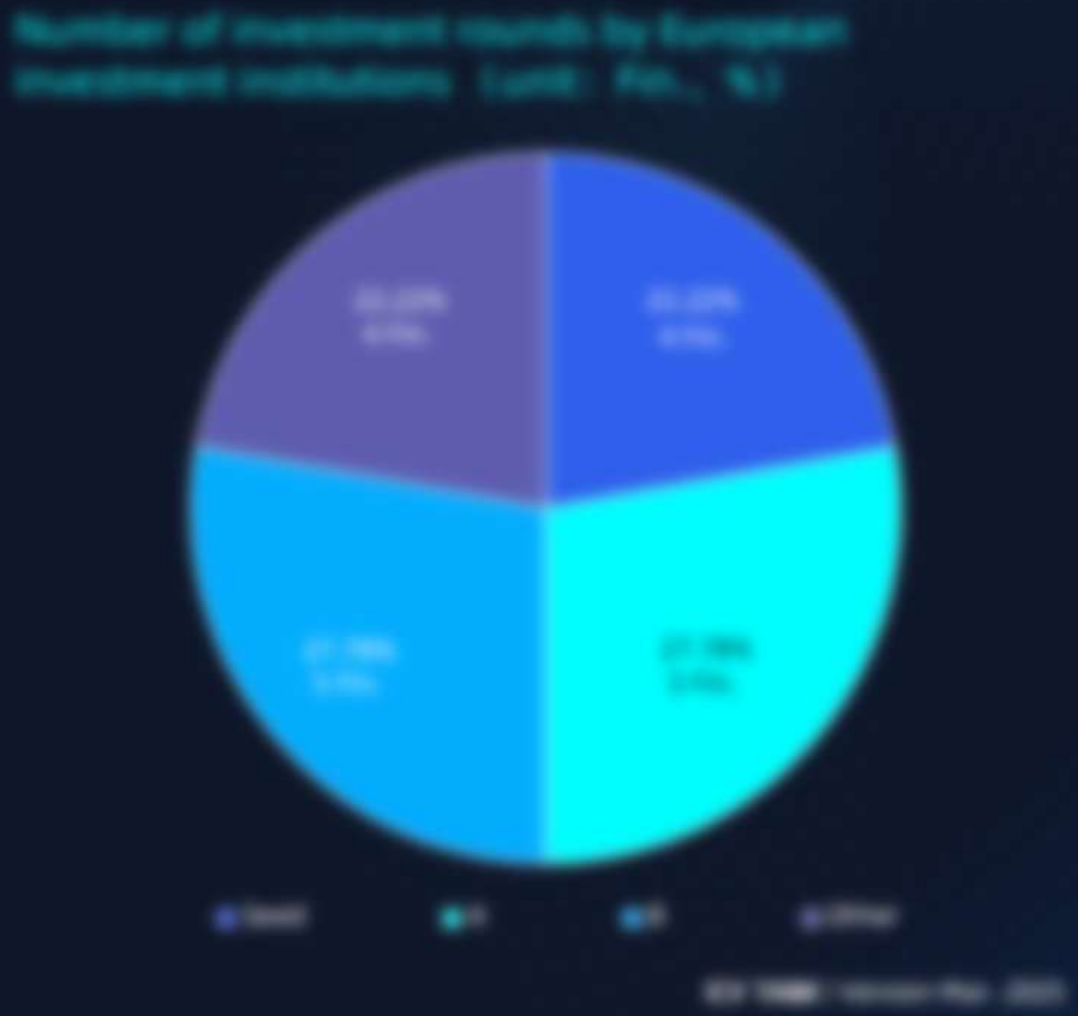
Chevron Completed a $100 Million Investment in OQC's Series B Financing.

Chevron Technology Ventures（CTV） supports Chevron's innovation, commercialization, and integration of emerging technologies. It helps Chevron create new business opportunities, reduce costs, and improve performance through emerging technologies. As a key technical "scout" for the company, CTV identifies, acquires, tests, verifies, and integrates suitable technologies into Chevron's core business.

Details of Chevron Technology Ventures Investment activities In 2024

Investment Institutions in the European Region Maintained a More Balanced Investment in Different Rounds of Companies in 2024.

- In the European region, investment in Seed, A, B and Other rounds is relatively evenly distributed. Specifically, seed round investment accounted for 22.22%, indicating that investment institutions maintained a certain amount of attention to the early stage of start-ups, supporting their initial market verification and product prototype development.
- Both Series A and Series B investments accounted for 27.78%, indicating strong interest in companies in the expansion stage, which may have demonstrated certain market potential and growth capacity and need capital for market expansion and business development. The share of investment in Other rounds was also 22.22%, which may reflect the flexibility and diversity of investment institutions for other special investment phases or outside rounds.



In 2024, EIC Made Joint Investments in Three Quantum Computing Companies.

The European Innovation Council (EIC) has been established under the EU Horizon Europe programme. It has a budget of €10.1 billion to support game changing innovations throughout the lifecycle from early stage research, to proof of concept, technology transfer, and the financing and scale up of start-ups and SMEs. The Fund is an important source of funding for start-ups and small businesses in Europe.

Details of EIC Investment activities In 2024

EIFO Made Seed Investments in Two Quantum Computing Firms, Showing a Positive Industry Outlook.

The Export and Investment Fund of Denmark (EIFO), a state - owned financial institution, provides financial support to companies, developers, and banks of various sizes and sectors in Denmark and globally.Denmark is strong in wind energy and new green tech, so EIFO focuses on promoting the global green transition. As Denmark's national promotional bank and export credit agency, EIFO is willing to take financial risks to facilitate bold thinking.

Details of EIFO Investment activities In 2024

QDNL Has Made a Comprehensive Layout of Quantum Technology from Early Incubation to Growth Stage.

Quantum Delta NL

QDNL Participations is a globally focused, independent venture capital fund dedicated to investing in quantum technology. Founded in 2022 and led by General Partner Ton van 't Noordende. The fund investment team is based in The Netherlands, the UK, and the US.

Details of QDNL Investment activities In 2024

Quantonation Has Invested in Two Series A Quantum Computing Companies, One of Which Is an Independent Investment.

Quantonation is an early stage venture capital fund investing globally in novel technologies based on advances in physics and/or computing. Physics has been, is and will be the fundamental operating system for world changing technology. Today, fields such as high-performance computation, secure communications, drug design or ultra-precise sensing are being driven by advancements from quantum technologies.

Details of Quantonation Investment activities In 2024

Maki.VC's Investment Activities Are All in the Early Stages, but the Investment Scale Is Relatively Small.

MAKI.VC

Maki.vc is a venture capital firm that focuses on deep technology and brand driven companies in the pre seed and seed stages. The company supports founders who challenge norms through scientific progress and in-depth customer understanding. The establishment of the company is to support bold visions and teams, provide funding for startups with overlooked, world shaping ideas, and build iconic, enduring brands.

Details of Maki.vc Investment activities In 2024

In 2024, Investment in the Asia Pacific Region Showed a Certain Level of Activity in the A-Round Environment.

- The data on the proportion of investment rounds by investment institutions in the Asia Pacific region in 2024 shows that the frequency of Series A investment is the highest, reaching 50.00%. This indicates that investment institutions in the region have a high interest in companies that are in the early stages of growth, have gradually clear business models, and need funds for market expansion. These types of enterprises have usually gone through the exploratory stage of the start-up phase, demonstrating certain market potential and profitability, thus attracting the attention of many investment institutions.
- The investment frequency of Angel and Seed rounds is 25.00%, indicating that in the early stages of start-up enterprises, although the risk is relatively high, there are still investment institutions willing to provide financial support for projects with innovation and growth potential.

Number of investment rounds by Asia Pacific investment institutions (unit: Pcs., %)

Zhongke Chuangxing Accelerates the Breakthrough of Quantum Technology Implementation with Keen Insight and Precise Layout.

Zhongke Chuangxing is an early stage investment institution focused on "hard technology". As the creator and pioneer of the "hard technology" concept, it has created a hard technology entrepreneurship ecosystem that includes research institutions, early investment, entrepreneurial platforms, and post investment services, providing professional support for technology entrepreneurs.

Details of Zhongke Chuangxing Investment activities In 2024

DBJ Has Made Early Investments in Qolab Twice in Just Two Months, Demonstrating a High Level of Recognition for the Company.

DBJ
日本政策投資銀行
Development Bank of Japan

The Development Bank of Japan Inc. (DBJ), a policy-based bank fully funded by the Japanese government, was established on October 1, 2008, succeeding the former Japan Development Bank (1951), Hokkaido-Tohoku Development Bank (1956), and the original DBJ (1999). DBJ provides long-term funding to businesses in Japan and overseas through equity investments, loans, and debt guarantees, while also leveraging new financial technologies.

Details of DBJ Investment activities In 2024

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PART FOUR

Conclusion and Outlook

The Investment Pattern in the Quantum Field Presents Prominent Government Strategic Advantages, and Future Market Opportunities and Challenges Coexist.

Conclusions and Outlook of Quantum Investment and Financing

Government Funding

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Social Financing

[illegible]

Investment Institutions

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2024 Investment and Financing in the Quantum Field Outlook

Product Family Report

Electronic (1-5 users)	6,500.00 USD
Electronic (6-10 users)	9,200.00 USD
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Electronic and 1 Hardcopy (6-10 users)	9,950.00 USD

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