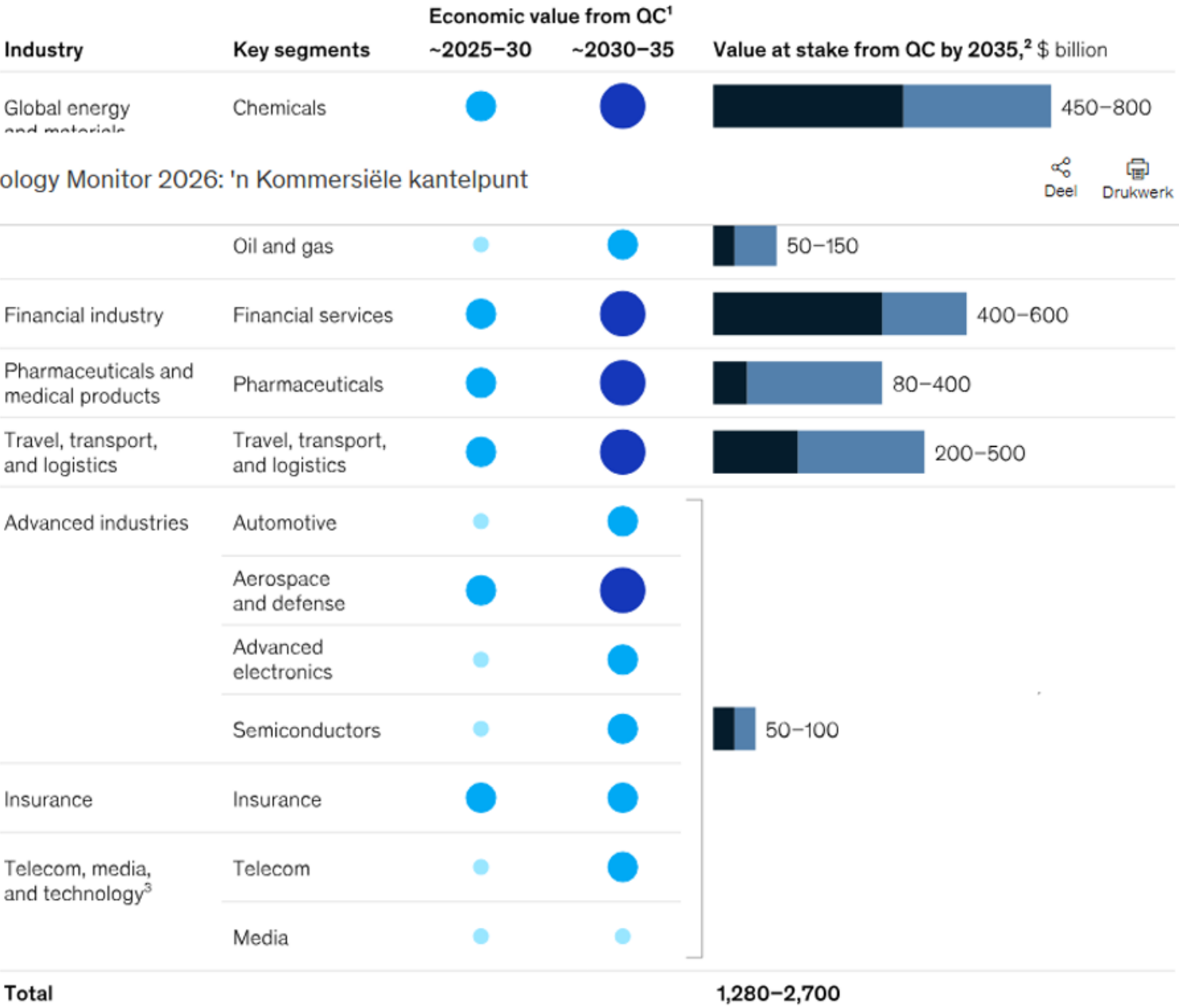


Quantum computing could deliver \$1.3 trillion to \$2.7 trillion in economic value to companies worldwide by 2035.

Impact of quantum computing (QC) across key industries Low Medium High



Note: The incremental impact of QC overlaps with the impact of gen AI, meaning the total value at stake is not entirely additive. Value estimates are approximate and not definitive projections for business value.

¹Defined as impact on revenue and cost savings relative to the industry size.

²Defined as the absolute impact in terms of revenue and cost savings.

³Excludes technology companies and quantum computing pure-play players.

Source: Oxford Economics; McKinsey analysis