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Global Stablecoins Market Research Report 2026(Status and Outlook)

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Abstracts

Stablecoins are cryptocurrencies designed to maintain price stability, and their value is usually anchored to one or more relatively stable assets, such as fiat currencies (such as the US dollar), commodities (such as gold), or other cryptocurrencies. Stablecoins play the role of "stable value storage" and "transaction medium" in the crypto market by reducing price volatility. Its core goal is to solve the problem of drastic price fluctuations of traditional cryptocurrencies (such as Bitcoin and Ethereum), provide a liquidity bridge for the cryptocurrency market, facilitate users to quickly enter and exit crypto assets, and support stable pricing in decentralized finance (DeFi) lending, trading and other scenarios.Explosive growth in market size: The total market value of stablecoins has increased from approximately US$5 billion in 2020 to over US$250 billion in 2025, with an annual transaction volume of US$35 trillion, surpassing traditional payment networks such as Visa. This growth is due to the fact that more than 90% of Bitcoin transactions in cryptocurrency exchanges are settled through stablecoins, and emerging market countries (such as Argentina and Nigeria) widely use them as "digital safe-haven assets".Diversified application scenarios: Stablecoins have expanded from cryptocurrency transactions to cross-border payments, decentralized finance (DeFi), supply chain finance, digital economic ecology and other fields. For example, Ripple's RLUSD supports real-time cross-border settlement, covering 60% of global remittance needs; the transfer fee between African countries through USDT is 60% lower than traditional services.Optimization of underlying blockchain efficiency: Ethereum is still the main issuance platform (accounting for 55%), but emerging public chains such as Solana and Base have risen rapidly with high throughput, accounting for 30% of on-chain transfers.The outbreak of Layer2 networks (such as Arbitrum and Optimism) has further alleviated the main network congestion problem.The rise of income-generating stablecoins: Although traditional fiat-collateralized stablecoins (such as USDT and USDC) account for 87% of the market share, income-generating stablecoins (such as

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USDe launched by Ethena Labs) provide holders with an annualized return of up to 9% through a Delta neutral hedging strategy, driving the transformation of stablecoins from a medium of exchange to a wealth management tool.Market concentration is high but competition is intensifying: USDT and USDC together account for 97%, but the entry of Internet giants and traditional financial institutions is changing the logic of competition. For example, JD.com announced that it will apply for licenses in major global currency countries and launch enterprise-level stablecoins to reduce cross-border payment costs; Ant Group is advancing on two fronts and plans to issue multi-currency stablecoins based on public chains.The rise of regional stablecoins: The UAE launched the dirham-anchored AE Coin, and local currency stablecoins such as Brazil's BRZ and Nigeria's cNGN have rapidly penetrated the region by reducing exchange rate risks. Citibank predicts that by 2030, the proportion of non-US dollar stablecoins will increase from less than 3% at present to 15%.

The global Stablecoins market size was estimated at USD 25340.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 43.30% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Stablecoins market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Stablecoins market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Stablecoins market.

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Global Stablecoins Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

AUDN

BinanceUSD

Dai

Diem

Ethena USDe

First Digital USD

Havven

Monerium EURe

Pax Gold

PayPal USD

TerraUSD

Tether

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Wrapped Bitcoin

TrueUSD

USD Coin

USD Tether

Market Segmentation (by Type)

Fiat-Backed Stablecoins

Crypto-Backed Stablecoins

Commodity-Backed Stablecoins

Algorithmic Stablecoins

Market Segmentation (by Application)

Cross-Border Payments and Remittances

Inter-Enterprise Payments

Employee Salary Payments

Cross-Border E-Commerce Settlements

Supply Chain Finance

Decentralized Finance (Defi)

Asset Hedging and Value Preservation

Others

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Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Stablecoins Market

Overview of the regional outlook of the Stablecoins Market:

Customization of the Report

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Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Stablecoins Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Stablecoins, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

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Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

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Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter’s five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

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