

Digital Asset Custody Market Size, Share & Trends Analysis Report By Type of Custody, By Asset Type, By Service Type, By Deployment, By End-use, By Region, And Segment Forecasts, 2025 - 2033

<https://marketpublishers.com/r/DFB1FA2DCC6EEN.html>

Date: October 2025

Pages: 130

Price: US\$ 4,950.00 (Single User License)

ID: DFB1FA2DCC6EEN

Abstracts

The global digital asset custody market size was estimated at USD 683.38 billion in 2024, and is projected to reach USD 4,378.84 billion by 2033, growing at a CAGR of 23.6% from 2025 to 2033. The digital asset custody market is gaining strong momentum, driven by the growing institutional adoption of cryptocurrencies and tokenized assets.

As hedge funds, asset managers, and corporate treasuries increasingly allocate capital to digital assets, the need for secure and compliant storage solutions has accelerated. Rising interest in spot Bitcoin ETFs and the expansion of tokenized securities further highlight the importance of reliable custodians. In addition, the entry of traditional banks and financial institutions has legitimized the market, building confidence among institutional investors.

Advancements in security infrastructure are shaping the evolution of digital asset custody. Multi-party computation (MPC), hardware security modules (HSMs), and cold-hot wallet integration are being widely deployed to enhance protection against cyberattacks and theft. Custodians are also leveraging blockchain technology for transparency, real-time auditing, and improved settlement efficiency. Furthermore, the integration of tokenization platforms and interoperability solutions is enabling custodians to support a broader range of assets, from cryptocurrencies to real-world asset tokens and central bank digital currencies (CBDCs).

The market has seen significant investment inflows, both from venture capital firms

backing crypto-native custodians and from established banks building digital custody infrastructure. Companies such as Fireblocks, Anchorage Digital, and BitGo have secured large funding rounds to scale custody operations, while institutions such as BNY Mellon, Fidelity, and State Street are allocating resources to expand regulated custody services. Strategic partnerships and joint ventures, such as Nomura's Komainu in Japan and Standard Chartered's Zodia Custody in Europe, reflect the rising capital commitment toward building trusted custody frameworks globally.

The regulatory environment is emerging as a critical factor shaping the digital asset custody market. In the U.S., the SEC and OCC are defining requirements for custodians, while in Europe, the Markets in Crypto-Assets (MiCA) regulation establishes harmonized rules for service providers. Asia Pacific jurisdictions such as Japan have introduced clear frameworks, whereas China restricts crypto custody and advances CBDC-focused models. This global regulatory momentum is fostering greater transparency and compliance, creating conditions for large-scale institutional participation in the custody market.

Despite its growth trajectory, the market faces several challenges. Regulatory uncertainty in certain jurisdictions creates hesitation among institutional investors and custodians alike. Cybersecurity risks remain a persistent concern and threats. In addition, the lack of uniform global standards for custody practices and auditing can hinder cross-border expansion.

Global Digital Asset Custody Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global digital asset custody market report based on type of custody, asset type, service type, deployment, end use, and region:

Type of Custody Outlook (Revenue, USD Billion, 2021 - 2033)

Hot Wallet Custody

Cold Wallet Custody

Asset Type Outlook (Revenue, USD Billion, 2021 - 2033)

Cryptocurrencies

Digital Securities

Tokenized Assets

Non-Fungible Tokens (NFTs)

Service Type Outlook (Revenue, USD Billion, 2021 - 2033)

Custody Services

Trading Services

Reporting & Compliance Services

Risk & Security Management

Deployment Outlook (Revenue, USD Billion, 2021 - 2033)

On-Premise

Cloud-based

End Use Outlook (Revenue, USD Billion, 2021 - 2033)

Institutional Investors

Hedge Funds

Asset Managers

Banks

Family Offices

Exchanges & Trading Platforms

Regional Outlook (Revenue, USD Billion, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Asia Pacific

China

Japan

India

South Korea

Australia

Latin America

Brazil

Middle East and Africa (MEA)

KSA

UAE

South Africa

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Fig. 65 Strategy framework

Fig. 66 Company Categorization

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