

# Custody Service Market Outlook 2025-2034: Market Share, and Growth Analysis By Service (Core custody services, Ancillary services, Core depository services, Other Administrative Services), By Type (Equity, Fixed Income, Alternative Assets, Other Types)

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## Abstracts

The Custody Service Market is valued at USD 40.2 billion in 2025 and is projected to grow at a CAGR of 10.5% to reach USD 98.7 billion by 2034. The custody service market plays a crucial role in the financial sector, offering safe and reliable storage solutions for institutional investors, mutual funds, hedge funds, and other entities that require secure custody of financial assets. Custodians provide a range of services including safekeeping, trade settlement, account administration, and reporting. With the increasing complexity of global financial markets, the need for transparent, compliant, and technologically advanced custody solutions has become more prominent. Moreover, the growth of digital assets and alternative investments has further diversified the offerings within the custody service market. The custody service market is expected to experience significant developments driven by the integration of advanced technologies and regulatory adaptations. Institutions are likely to invest in upgrading their digital infrastructure to support blockchain-based assets and cryptocurrency custody. As traditional financial entities continue to enter the digital asset space, partnerships between fintech companies and established custodians will become more common. Additionally, enhanced regulatory clarity in key regions is anticipated to foster greater confidence in custody solutions, enabling institutions to broaden their portfolio of custodial services to include more diverse asset classes. Looking beyond 2024, the custody service market is poised for sustained growth as financial innovation continues to reshape the landscape. The rise of tokenized securities and increased adoption of blockchain technology will drive demand for custodians capable of handling complex digital asset transactions. Ongoing improvements in cybersecurity measures and data

protection will ensure that custodians remain trusted partners in managing clients' financial assets. Furthermore, expanding regulatory frameworks and international standards are likely to harmonize custody practices globally, fostering greater transparency and interoperability. As a result, the custody service market is set to play a pivotal role in the evolving financial ecosystem.

### Key Insights Custody Service Market

Growing adoption of blockchain technology for secure custody of digital assets.

Increasing demand for multi-asset custody platforms that integrate traditional and digital assets.

Enhanced cybersecurity measures to address evolving threats and protect client data.

Collaboration between traditional financial institutions and fintech companies to develop advanced custody solutions.

Expansion of regulatory compliance frameworks to cover emerging asset classes.

Rising demand for secure, transparent, and scalable custody solutions.

Growth of digital assets, including cryptocurrencies and tokenized securities.

Increased institutional participation in alternative investments.

Technological advancements enabling efficient and cost-effective custody services.

High costs of implementing advanced digital infrastructure.

Regulatory uncertainty in certain jurisdictions.

Rapidly evolving cybersecurity threats requiring continuous investment.

### Custody Service Market Segmentation

## By Service

Core custody services

Ancillary services

Core depository services

Other Administrative Services

## By Type

Equity

Fixed Income

Alternative Assets

Other Types

## Key Companies Analysed

JPMorgan Chase & Co.

HSBC Holdings plc

Citigroup Inc.

Wells Fargo & Company

BNP Paribas

UBS AG

State Bank of India

Groupe Caisse d'Épargne

Deutsche Bank AG

HDFC Bank Ltd.

ICICI Bank Ltd.

The Bank of New York Mellon Corporation

DBS Bank Ltd.

Commerzbank AG

State Street Bank and Trust Company

Northern Trust Corporation

Hang Seng Bank Limited

Kotak Mahindra Bank Limited

Standard Chartered plc

Yes Bank Ltd.

Societe Generale Securities Services GmbH

Stock Holding Corporation of India Ltd.

Julius Baer Group AG

Brown Shipley & Co. Limited

RBC Investor & Treasury Services

Edelweiss Custodial Services Ltd.

Orbis Financial Corporation Ltd.

Axis Bank Ltd.

Brown Brothers Harriman & Co.

Infrastructure Leasing & Financial Services Ltd.

### Custody Service Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

### Custody Service Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

### Countries Covered

North America — Custody Service market data and outlook to 2034

United States

Canada

Mexico

Europe — Custody Service market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Custody Service market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

## Middle East and Africa — Custody Service market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

## South and Central America — Custody Service market data and outlook to 2034

Brazil

Argentina

Chile

Peru

*\* We can include data and analysis of additional countries on demand.*

### Research Methodology

This study combines primary inputs from industry experts across the Custody Service value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

### Key Questions Addressed

What is the current and forecast market size of the Custody Service industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the Custody Service Market Report

Global Custody Service market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Custody Service trade, costs, and supply chains

Custody Service market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Custody Service market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Custody Service market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Custody Service supply chain analysis

Custody Service trade analysis, Custody Service market price analysis, and

Custody Service supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Custody Service market news and developments

### Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

*\* The updated report will be delivered within 3 working days*

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