

Digital Asset Custody Market Forecasts to 2034 – Global Analysis By Custody Type (Cold Storage Custody, Hot Wallet Custody, Warm/Hybrid Custody, Self-Custody Solutions, Third-Party Custody Services), Asset Type, Security Architecture, Use Case, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Digital Asset Custody Market is accounted for \$837.4 billion in 2026 and is expected to reach \$5,436 billion by 2034 growing at a CAGR of 23.1% during the forecast period. Digital Asset Custody refers to secure storage and management solutions for cryptocurrencies and other digital assets. These platforms provide institutional-grade security using technologies such as cold storage, multi-signature wallets, encryption, and key management systems. Custodians ensure asset protection, regulatory compliance, and transaction facilitation for investors, exchanges, and financial institutions. As digital asset adoption grows, custody solutions are becoming critical for safeguarding assets, enabling institutional participation, and supporting secure trading and investment in blockchain-based financial ecosystems.

Market Dynamics:

Driver:

Rising need for secure asset storage

The growth of decentralized finance (DeFi) and digital trading platforms has heightened the importance of secure custody services. Cold storage and advanced cryptographic methods are being adopted to mitigate risks of theft and hacking. Institutional

participation in digital assets further accelerates demand for regulated custody solutions. Rising consumer awareness of asset protection also strengthens adoption. Collectively, these factors are fueling strong market growth.

Restraint:

High infrastructure and security costs

Smaller firms often struggle with the financial burden of deploying advanced cryptographic systems. Ongoing expenses related to compliance, audits, and cybersecurity add to operational challenges. Integration with legacy financial systems further increases complexity. Additionally, the need for continuous upgrades to counter evolving threats raises costs. These barriers collectively slow down widespread adoption despite strong demand.

Opportunity:

Integration with decentralized finance ecosystems

Custody platforms can facilitate lending, staking, and trading directly within secure environments. Partnerships with DeFi protocols are driving innovation in custodial offerings. Integration also enhances liquidity and accessibility for institutional investors. Moreover, DeFi-linked custody solutions improve transparency and efficiency in asset management. As DeFi adoption grows globally, custody platforms will benefit from accelerated expansion.

Threat:

Loss of private keys risks

Even advanced custody solutions face challenges in balancing accessibility with security. Fraudsters exploiting vulnerabilities in key management systems further complicate risk mitigation. Regulatory scrutiny around custody practices adds compliance pressure. Consumer trust can be severely damaged by incidents of lost or compromised keys. Without robust recovery frameworks, these risks could undermine long-term market stability.

Covid-19 Impact:

The Covid-19 pandemic reshaped the digital asset custody landscape, with heightened demand for secure platforms as digital trading surged. Lockdowns accelerated adoption of cryptocurrencies and tokenized assets, increasing reliance on custody solutions. However, economic uncertainty slowed institutional investment in some regions. Rising cybercrime during the pandemic highlighted the urgency of robust custody frameworks. At the same time, remote work environments boosted demand for cloud-based and hybrid custody solutions. Overall, Covid-19 acted as both a catalyst and a challenge, reshaping priorities in the custody market.

The cold storage custody segment is expected to be the largest during the forecast period

The cold storage custody segment is expected to account for the largest market share during the forecast period as institutions prioritize offline solutions to mitigate hacking risks. Cold storage offers maximum security by keeping assets disconnected from online networks. Rising demand for institutional-grade custody strengthens adoption. Integration with compliance frameworks enhances trust among regulators and investors. Cold storage remains the preferred choice for long-term asset holding. These factors ensure the segment's dominance in market share.

The multi-party computation (MPC) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the multi-party computation (MPC) segment is predicted to witness the highest growth rate due to rising demand for advanced cryptographic solutions. MPC enables distributed key management, reducing risks of single-point failures. The segment benefits from integration with institutional custody platforms. AI-driven analytics further enhance MPC's efficiency and scalability. Regulatory focus on secure digital asset management accelerates adoption. This dynamic environment positions MPC as the fastest-growing segment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to advanced financial infrastructure and strong institutional participation. The U.S. leads in adoption of regulated custody solutions, supported by fintech innovation and regulatory clarity. Major banks and asset managers are investing heavily in digital asset custody. Rising demand for secure institutional-grade platforms further strengthens growth. Additionally, North America hosts several leading custody

technology providers, reinforcing its dominance. These factors collectively secure North America's leadership in market share.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by rising cryptocurrency adoption. Countries such as China, India, and Singapore are spearheading innovation in custody solutions. Rising smartphone penetration and digital payment ecosystems fuel demand for secure asset storage. Governments are actively promoting blockchain adoption through supportive policies. Moreover, Asia Pacific's large retail and institutional investor base provides a vast market for custody platforms.

Key players in the market

Some of the key players in Digital Asset Custody Market include Coinbase Custody, BitGo Technologies, Inc., Fireblocks, Anchorage Digital, Gemini Trust Company, Kraken Custody, Ledger SAS, Metaco SA, Hex Trust, Standard Chartered (Zodia Custody), BNY Mellon, State Street Digital, Fidelity Digital Assets, Bakkt Holdings, Inc., Copper Technologies and Swisscom Digital Asset Services.

Key Developments:

In January 2026, Hex Trust entered an elite Joint Venture as a Super Validator on the Canton Network, joining Goldman Sachs and BNP Paribas. This alliance places Hex Trust at the governance helm of a network securing \$6 trillion in tokenized assets.

In December 2025, Coinbase completed the Acquisition of the crypto derivatives exchange Deribit for \$2.9 billion, the largest acquisition in crypto history. This move allows Coinbase Custody to offer integrated clearing and settlement for a massive institutional derivatives market.

Custody Types Covered:

Cold Storage Custody

Hot Wallet Custody

Warm/Hybrid Custody

Self-Custody Solutions

Third-Party Custody Services

Asset Types Covered:

Cryptocurrencies

Tokenized Securities

Stablecoins

NFTs & Digital Collectibles

Other Asset Types

Security Architectures Covered:

Multi-Signature Wallets

Hardware Security Modules (HSM)

Multi-Party Computation (MPC)

Key Sharding & Encryption

Other Security Architectures

Use Cases Covered:

Institutional Asset Management

Exchange Custody Services

Fund & ETF Custody

Tokenization Custody

Other Use Cases

End Users Covered:

Institutional Investors

Crypto Exchanges

Banks & Financial Institutions

Asset Managers

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Digital Asset Custody Market Forecasts to 2034 – Global Analysis By Custody Type (Cold Storage Custody, Hot Wa...

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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