

Stablecoin & CBDC Platforms Market Forecasts to 2034 – Global Analysis By Platform (Stablecoin Issuance Platforms, CBDC Platforms, Wallet & Custody Platforms, Payment & Settlement Platforms and Other Platforms), Technology, Use Case, Adoption & Integration, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Stablecoin & CBDC Platforms Market is accounted for \$26.1 billion in 2026 and is expected to reach \$63.8 billion by 2034 growing at a CAGR of 11.8% during the forecast period. Stablecoin & Central Bank Digital Currency (CBDC) Platforms are digital financial infrastructures that support issuance, management, and transaction of cryptocurrencies backed by assets or central banks. Stablecoins provide price stability and facilitate global transactions, while CBDCs offer regulated digital currencies for sovereign use. Platforms include wallet solutions, transaction processing, compliance monitoring, and smart contracts. Adoption is driven by the growth of digital finance, cross-border payments, and the need for secure, efficient, and transparent financial systems in both private and government-backed digital currencies.

Market Dynamics:

Driver:

Rising digital currency adoption

The growing penetration of blockchain-based applications across financial services is further accelerating demand for stablecoin issuance platforms. Institutional investors are

also showing heightened interest in digital assets, boosting credibility and adoption. The integration of stablecoins into decentralized finance (DeFi) ecosystems is creating new transaction models and liquidity pools. Moreover, cross-border remittances are being streamlined through stablecoin platforms, reducing transaction costs and settlement times. Collectively, these factors are propelling the expansion of the market.

Restraint:

Volatility concerns for stablecoins

Market participants worry about potential de-pegging risks, which could undermine trust in stablecoin platforms. The lack of standardized global regulations adds uncertainty, limiting institutional adoption in certain jurisdictions. Additionally, liquidity mismatches and operational inefficiencies in issuance platforms may hinder scalability. Cyber incidents and governance lapses have also raised caution among investors and regulators. These challenges collectively temper the otherwise strong growth trajectory of the stablecoin and CBDC platforms market.

Opportunity:

Central bank digital currency initiatives

CBDCs are expected to enhance financial inclusion by providing secure, low-cost digital payment options to unbanked populations. Their integration into existing banking systems will foster interoperability and trust. Moreover, CBDCs can strengthen monetary policy transmission by offering central banks direct control over digital currency circulation. Partnerships between technology providers and central banks are opening new avenues for innovation in issuance platforms. As pilot projects transition into full-scale rollouts, CBDCs will significantly expand the market's scope.

Threat:

Cybersecurity risks on platforms

Sophisticated cyberattacks targeting wallets, exchanges, and issuance platforms can erode user confidence. The rise of ransomware and phishing schemes further amplifies vulnerabilities in digital currency ecosystems. Regulatory penalties for breaches may also damage reputations and restrict operations. Moreover, geopolitical tensions could lead to state-sponsored cyber intrusions targeting CBDC infrastructures. Without robust

security frameworks, these risks could undermine the long-term sustainability of the market.

Covid-19 Impact:

The Covid-19 pandemic accelerated digital payment adoption, indirectly boosting interest in stablecoins and CBDCs. Lockdowns and social distancing measures highlighted the need for contactless, efficient payment systems. Governments and enterprises turned to digital platforms to maintain economic continuity, spurring demand for blockchain-based solutions. However, supply chain disruptions and economic uncertainty slowed some pilot projects and regulatory approvals. At the same time, heightened focus on financial resilience encouraged central banks to explore CBDCs more actively. Overall, Covid-19 acted as a catalyst, reshaping consumer behavior and strengthening the case for digital currency platforms.

The stablecoin issuance platforms segment is expected to be the largest during the forecast period

The stablecoin issuance platforms segment is expected to account for the largest market share during the forecast period as enterprises and DeFi ecosystems increasingly rely on stablecoins for liquidity and settlement. Their ability to provide instant, low-cost transactions makes them attractive for cross-border payments and remittances. Institutional adoption is also rising, with stablecoins being integrated into trading and hedging strategies. The segment benefits from growing partnerships between fintech firms and blockchain developers. Enhanced transparency and compliance measures are further boosting confidence in issuance platforms.

The central banks segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the central banks segment is predicted to witness the highest growth rate due to the rapid expansion of CBDC initiatives worldwide. Governments are prioritizing CBDCs to modernize payment infrastructures and strengthen monetary sovereignty. Pilot programs in Asia, Europe, and North America are transitioning into large-scale implementations. The segment is also driven by collaborations between central banks and technology providers to ensure secure, scalable platforms. CBDCs are expected to enhance financial inclusion, particularly in emerging economies.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to strong institutional adoption, advanced blockchain infrastructure, and proactive regulatory frameworks. The U.S. and Canada are witnessing significant investments in stablecoin issuance platforms, supported by fintech innovation. Major financial institutions are integrating stablecoins into payment and settlement systems. Additionally, North America hosts several leading blockchain technology providers, reinforcing its dominance. Regulatory clarity around digital assets is also fostering confidence among enterprises and investors. 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 aggressive CBDC initiatives and rapid digital payment adoption. Countries such as China, India, and Singapore are spearheading CBDC pilots and blockchain integration. Rising smartphone penetration and fintech innovation are fueling demand for digital currency platforms. Governments in the region are actively promoting financial inclusion through digital payment ecosystems. Moreover, Asia Pacific's large population base provides a vast market for CBDC adoption.

Key players in the market

Some of the key players in Stablecoin & CBDC Platforms Market include Circle Internet Financial, LLC, Tether Limited, Paxos Trust Company, Coinbase, Inc., Binance, Ripple Labs Inc., Stably Corporation, AnchorUSD, Gemini Trust Company, BIS Innovation Hub, J.P. Morgan Onyx, Signature Bank, Metaco SA, Fireblocks and BitGo Technologies, Inc.

Key Developments:

In February 2026, Ripple Labs Inc. secured conditional approval from the OCC to establish the Ripple National Trust Bank (RNTB). This allows Ripple to manage reserves for its RLUSD stablecoin and offer regulated digital asset custody, positioning the firm to challenge Circle and Tether for institutional settlement market share.

In September 2025, Fireblocks launched the 'Network for Payments,' a single-integration engine that connects merchants and institutions to 60+ fiat currencies and all major stablecoins (USDC, USDT, PYUSD). This product launch saw a 120% volume

growth within its first six months of operation.

Platforms Covered:

Stablecoin Issuance Platforms

CBDC Platforms

Wallet & Custody Platforms

Payment & Settlement Platforms

Other Platforms

Technologies Covered:

Public Blockchain-Based Solutions

Permissioned Blockchain Solutions

Smart Contracts & Tokenization

CBDC Interoperability & Integration

Other Technologies

Use Cases Covered:

Cross-Border Payments

Trade Finance & Settlement

Remittances

Retail Payments

Government & Central Bank Use Cases

Other Use Cases

Adoption & Integration Types Covered:

Financial Institution Adoption

Cross-Platform Integration

Interoperability with Existing Systems

Integration with Digital Wallets

Other Adoption & Integrations

End Users Covered:

Central Banks

Commercial Banks

Payment Service Providers

Corporates & Enterprises

FinTech Companies

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:

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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