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Bitcoin's Price Stalls as Institutional Buys Fail to Offset Falling Demand

July 7, 2025

— Categories: *Crypto*



In a market where big names like Michael Saylor and major funds continue to scoop up Bitcoin (BTC), many expected prices to surge past previous highs. But the reality is proving more complex. Despite steady interest from institutions and corporate treasuries, Bitcoin remains stuck in a consolidation phase, and analysts say falling spot demand is a key reason why.

A recent report by blockchain analytics firm CryptoQuant points to a significant drop in overall demand for BTC. Over the past 30 days, demand has contracted by about 895,000 BTC. This decline outweighs the positive impact of institutional buys, including those from

MicroStrategy (MSTR), the business intelligence firm led by Bitcoin advocate Michael Saylor.

Saylor's Bitcoin buying strategy has been closely watched for years, with MicroStrategy building one of the largest BTC holdings among publicly traded companies. But even MSTR's recent purchases haven't been enough to lift the market. In December, MicroStrategy added 171,000 BTC to its balance sheet. In the most recent month, that number fell sharply to just 16,000 BTC. Similarly, Bitcoin Exchange Traded Fund (ETF) inflows dropped from 86,000 BTC to 40,000 BTC in the same period.

CryptoQuant's data suggests that while ETF and MSTR buy represent an important slice of BTC demand, they simply aren't strong enough to make up for the broader slowdown in retail and spot interest. One of the indicators supporting this is Bitcoin's nearly empty mempool, a sign that fewer users are actively sending transactions on the network.

This raises a bigger question: What happens if institutional demand starts to slow down too?

Anthony Scaramucci, founder of SkyBridge Capital, believes the corporate trend of adding Bitcoin to treasury reserves may not last. "Right now we're having this replicative treasury company idea," he said in a recent Bloomberg interview. "So, you know, it will fade."

While long-term believers in Bitcoin remain optimistic, the current data tells a more cautious story. Without a resurgence in spot market activity or a new wave of retail interest, Bitcoin's price may continue to face resistance even with big players still in the game.

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