(Market) Size Matters:
Unravelling the Literature on Supply Chain Finance Market Sizing

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GSCFF
GLOBAL SUPPLY CHAIN FINANCE FORUM

Purpose of this Project

Unravel the literature on supply chain finance market sizing

The industry is thirsting for some form of SCF market size quantification.

Various figures are used to showcase a finance provider's own market share or highlight the market's future growth potential.

But which numbers exist and how do we know these numbers are reliable?

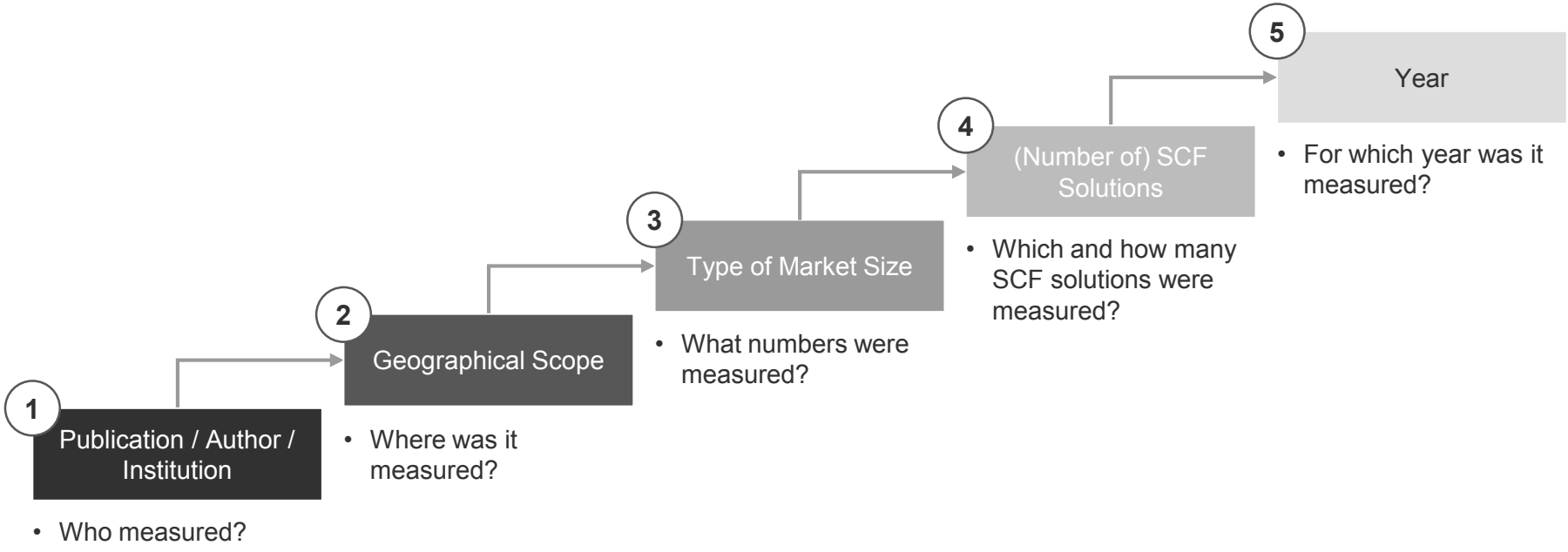
The goal of this project was to

- Provide a comprehensive overview of the available literature that defines the size of the global supply chain finance (SCF) market,[1)]
- Depict what the available data says in terms of global SCF market size, and
- Assess what this quantification is worth.

1) As of 30 June 2021

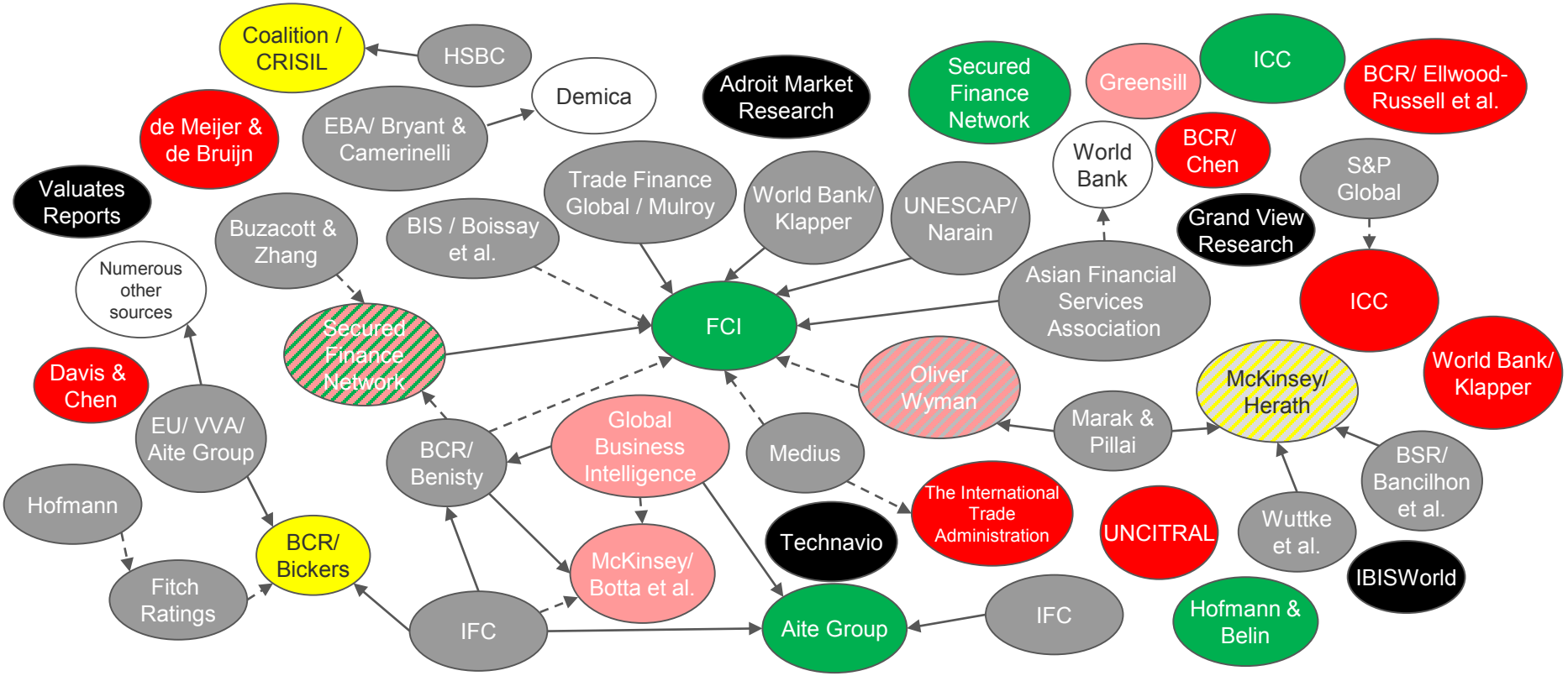
Key Aspects for Measurement of the SCF Market Size

Data selection process based on 5 variables



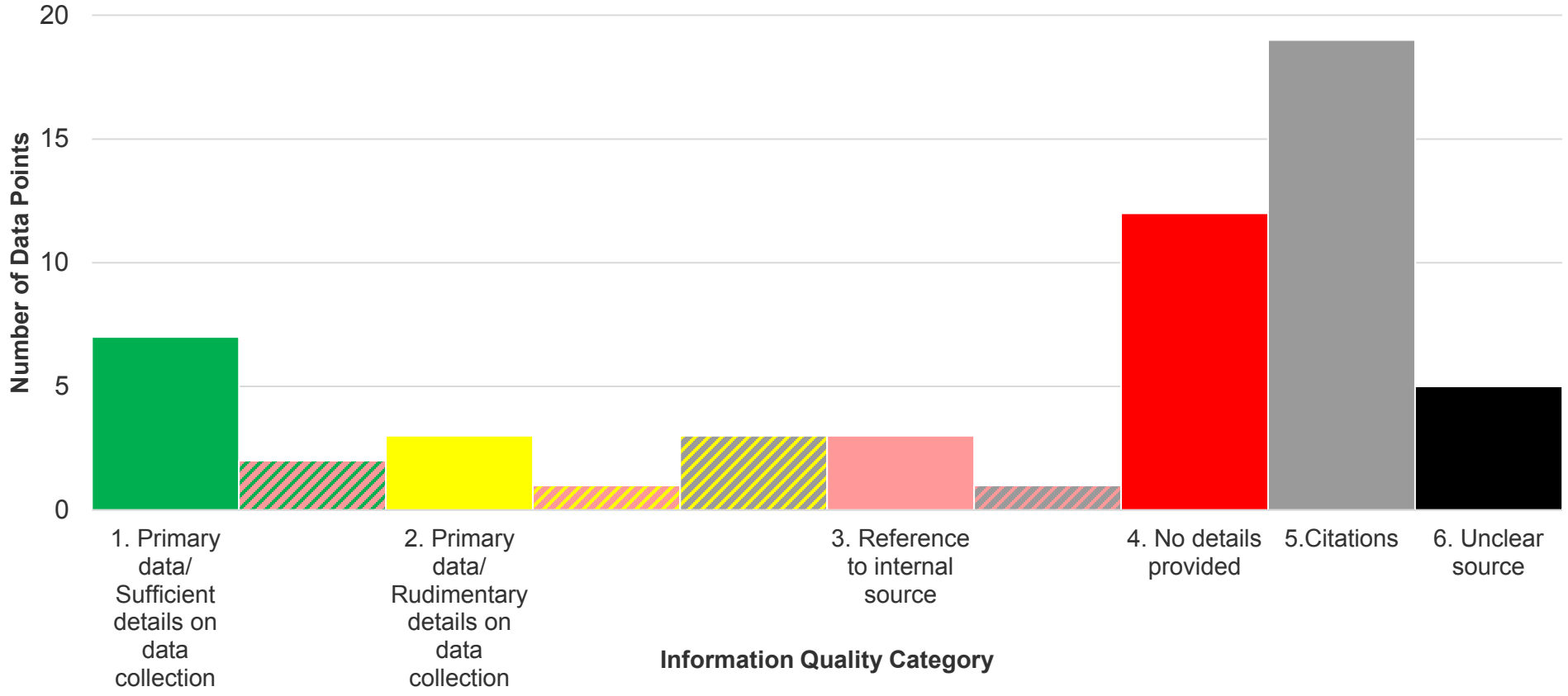
1 Publication / Author / Institution

Total of 56 data points gathered across 41 publications



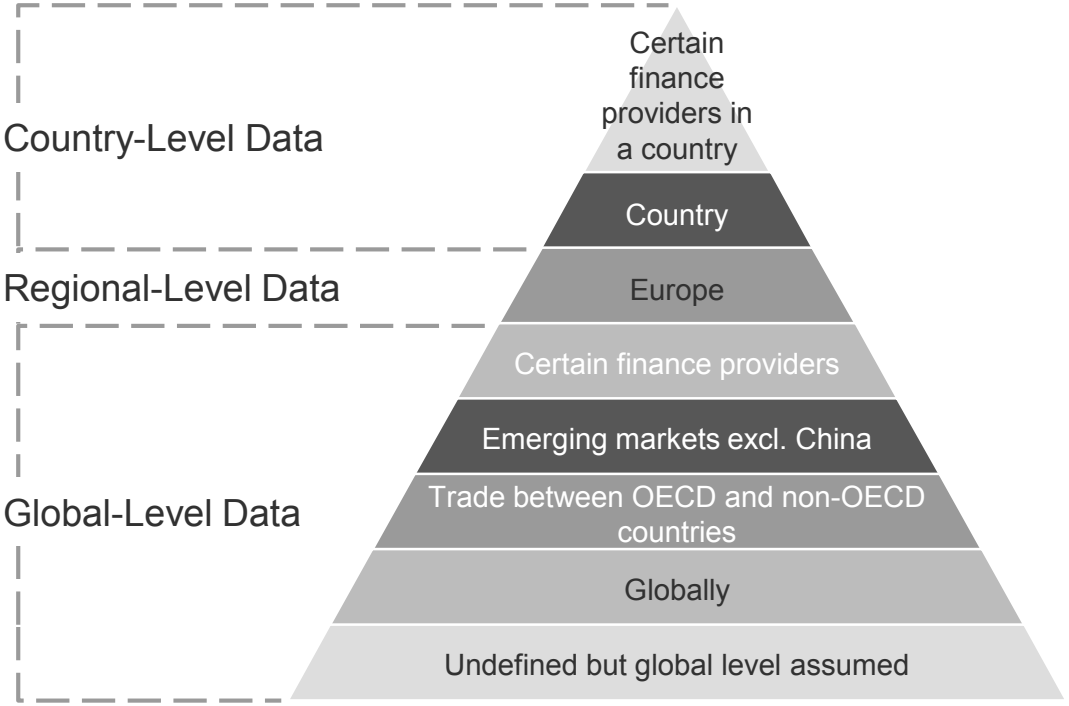
1 Publication / Author / Institution

6 categories of information quality



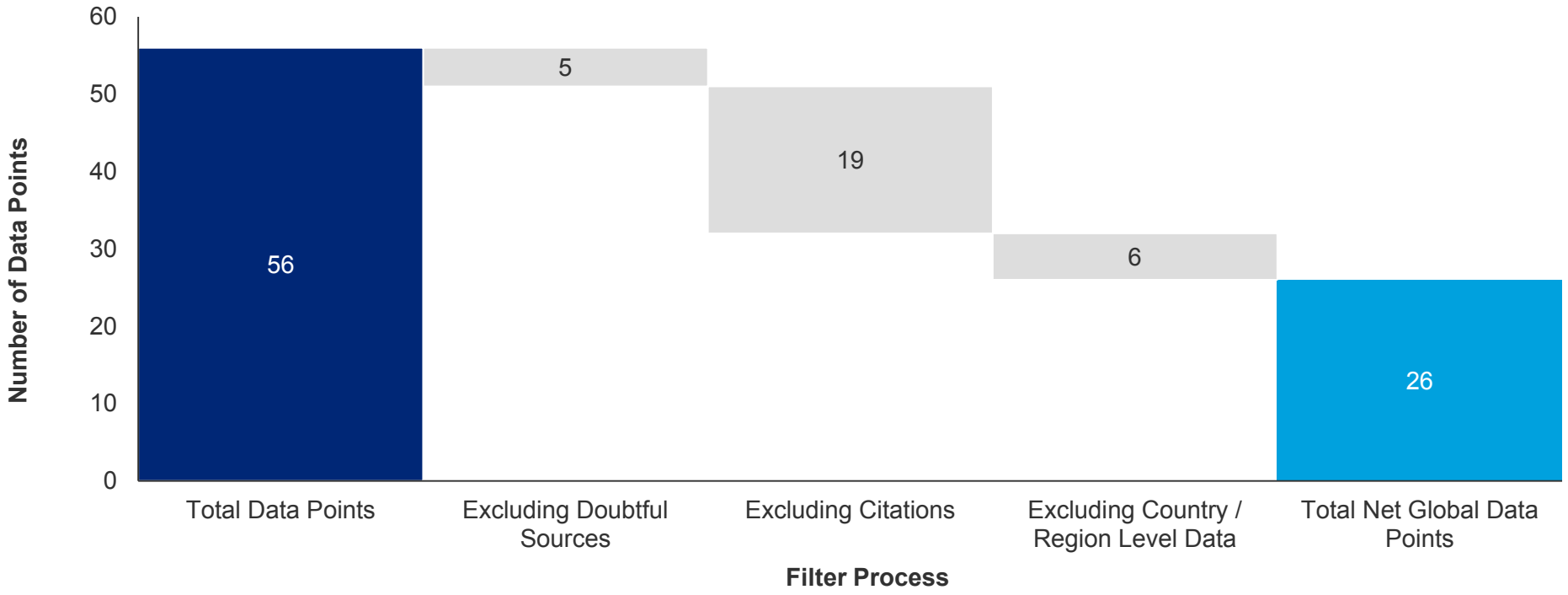
2 Geographical Scope

Geographical reach of each market size figure taken into account



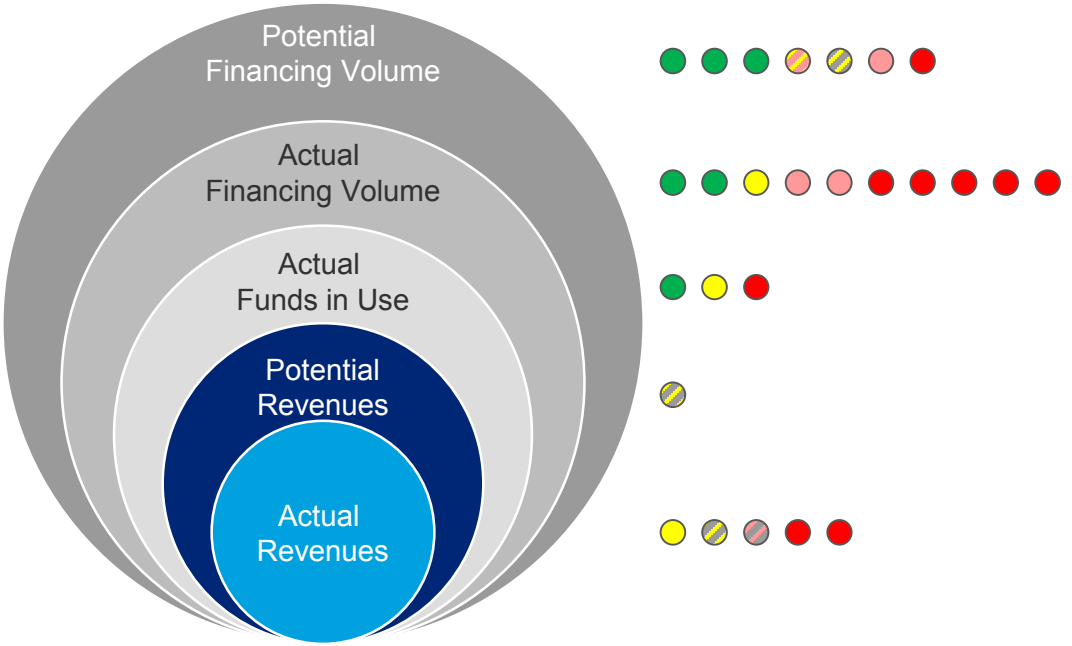
Filter Process

Final data base of 26 data points selected for further assessment



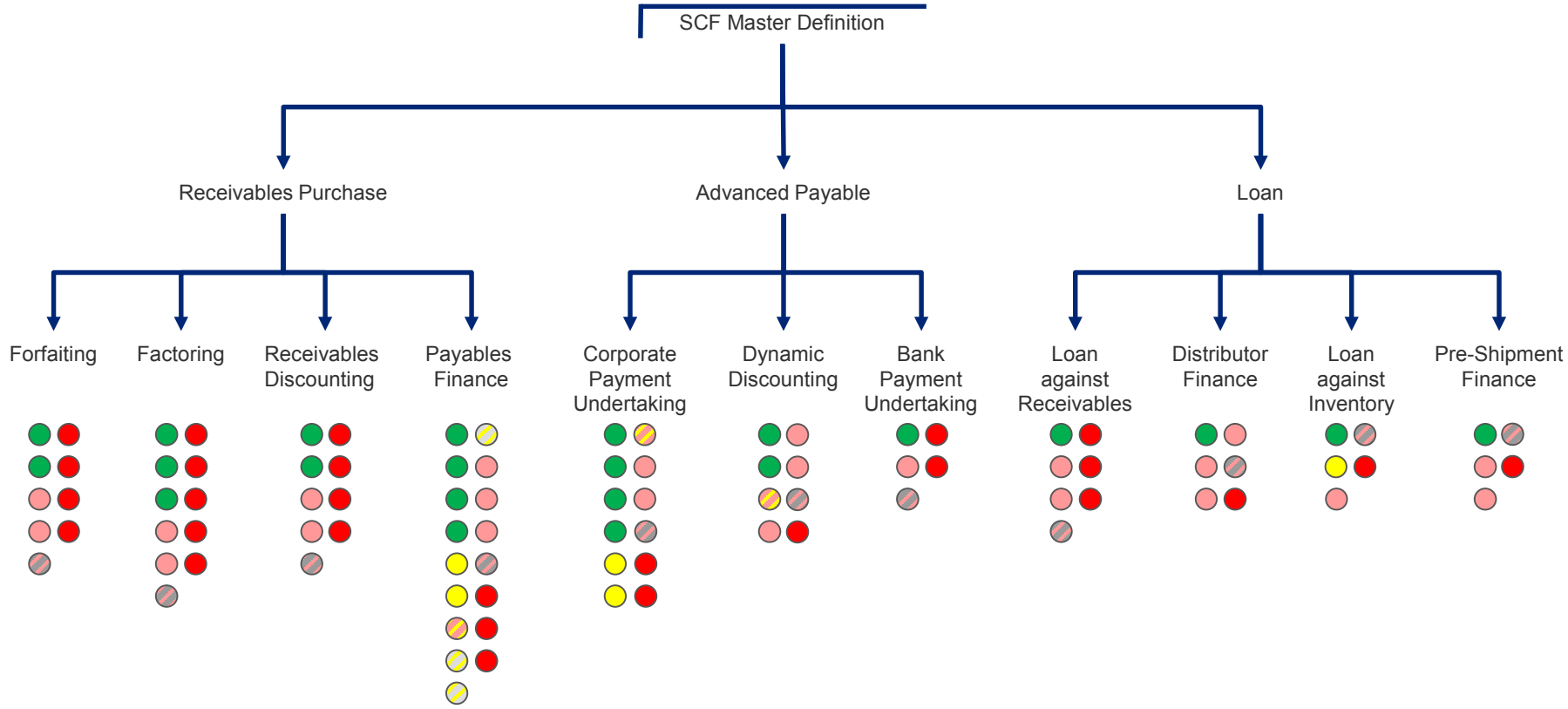
3 Type of Market Size

Actual and potential financing volume as the predominant market size figure across all 26 data points



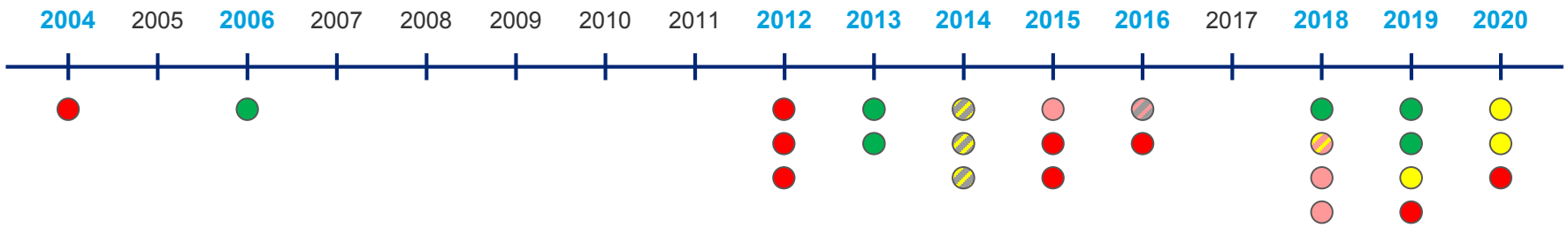
④ (Number of) SCF Solutions

Emphasis put on buyer-centric solutions, followed by receivables purchase instruments



5 Year

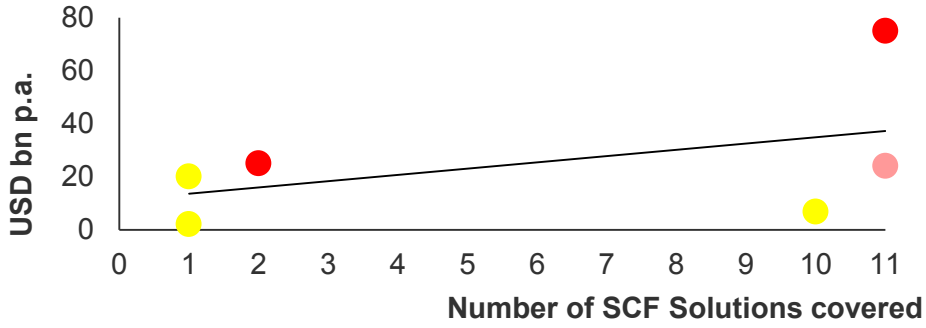
Most market size figures refer to the past decade



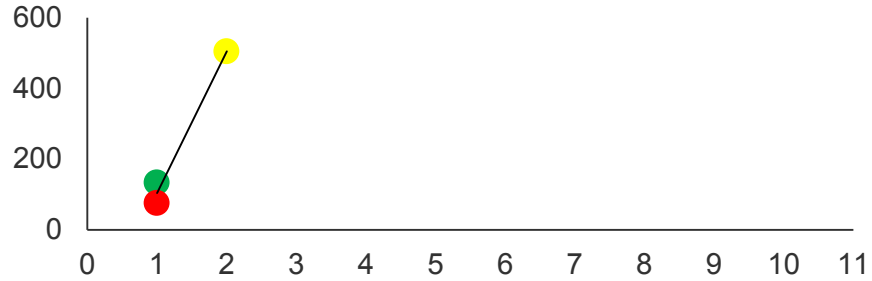
Global SCF Market Size

Existing market size figures form a highly fragmented and heterogeneous picture

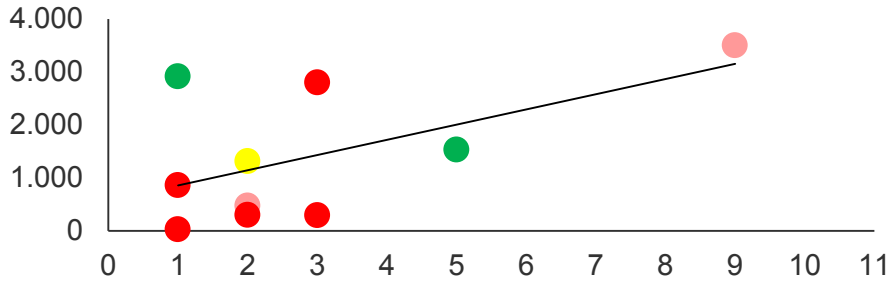
Actual (Potential) Revenues



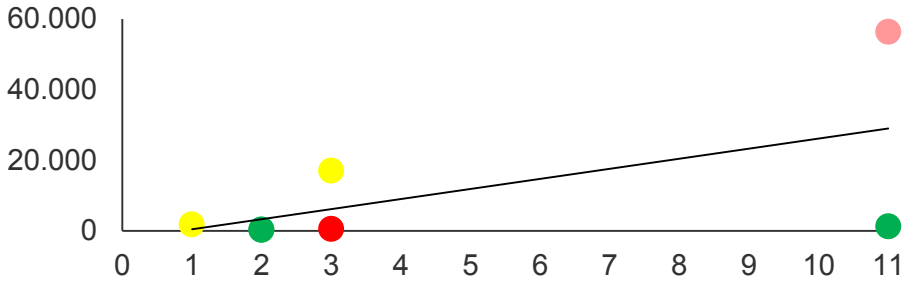
Actual Funds in Use



Actual Financing Volume



Potential Financing Volume



Key Takeaways

Again: The industry is thirsting for some form of SCF market size figures without scrutiny.

However, available data on the market size of supply chain finance lacks either

- Sufficient **background on data collection and methodology**,
- Comprehensiveness in terms of **SCF solutions taken into account**,
- **Global geographical coverage**, or
- **Up-to-dateness**.

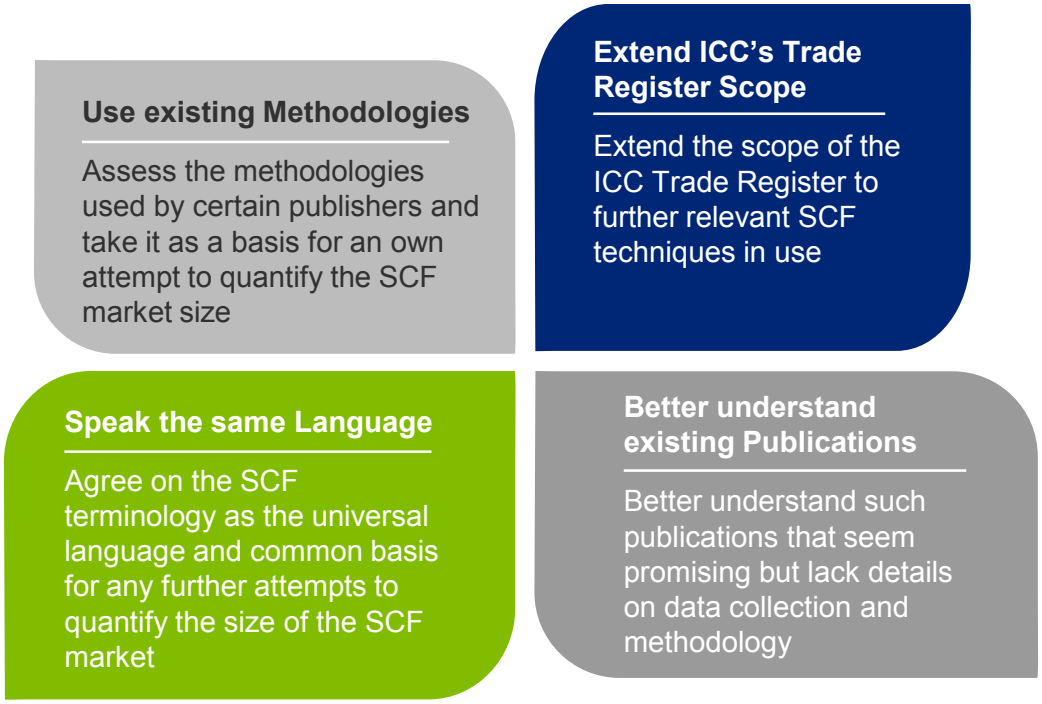
Publications worth highlighting

1. **FCI**'s often cited **annual review** forms a good basis for further analysis but remains vague on the definition of financing products included in its analysis and covers only a fraction of the SCF universe.
2. **Aite Group** makes a promising attempt to provide some form of methodology to quantify the market size but focuses on buyer-centric solutions, only.
3. **McKinsey** and **BCR** remain a popular source for market size figures but provide very limited information on data gathering and methodology.

Not a single source provides reliable, comprehensive and up-to-date global SCF market size figures.

Next Steps

Build on the existing data infrastructure



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