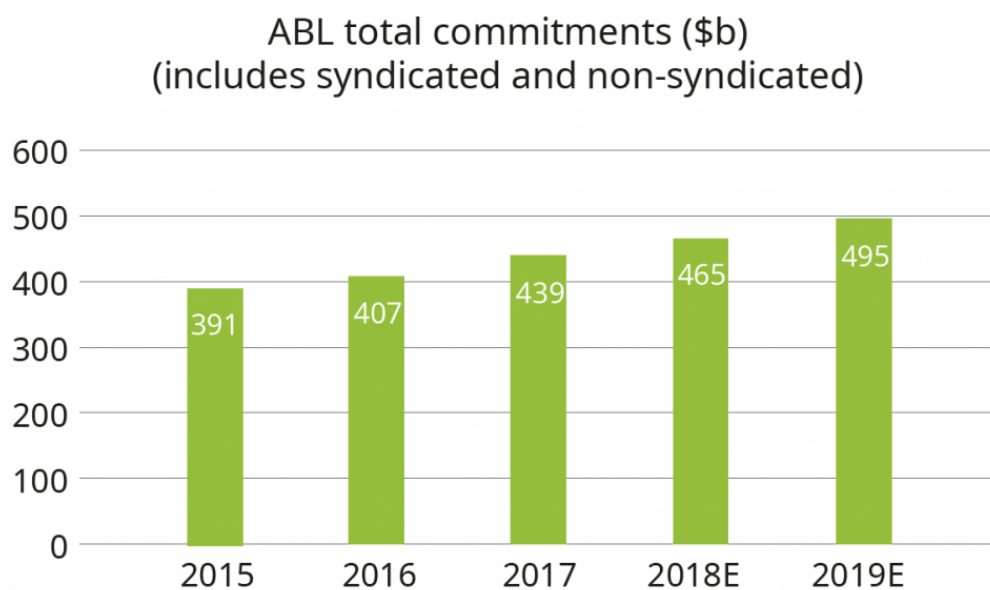


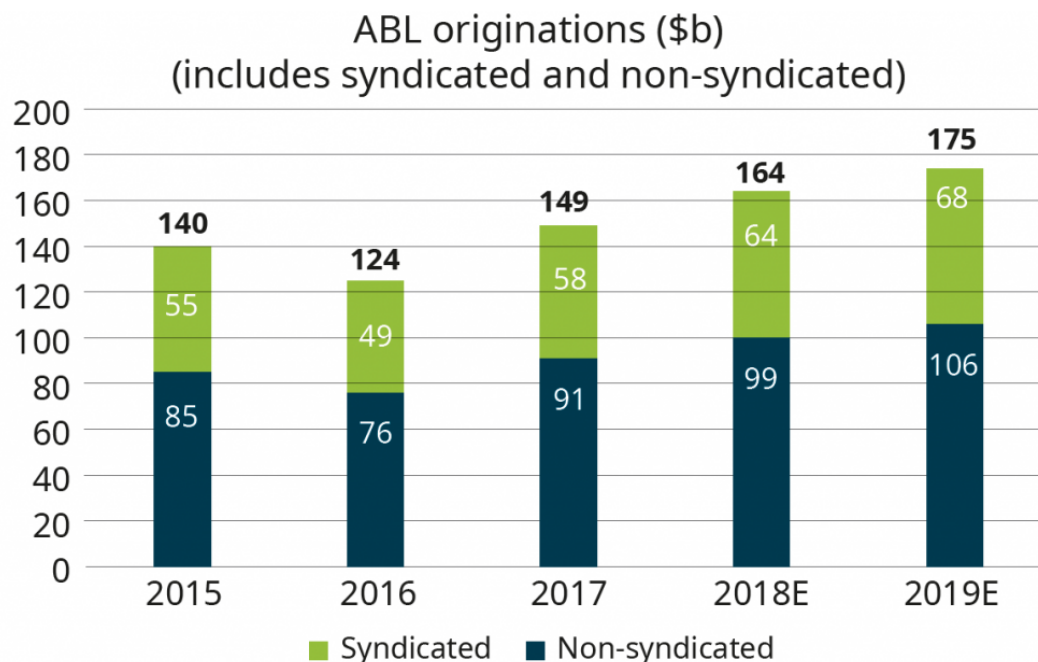
US Asset-Based Lending Market Size

THE LEAD | May 16, 2019

Charts



Source: CFA Westat surveys, LPC Refinitiv, Study



Source: CFA Westat surveys, LPC Refinitiv, Study

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US ABL Market

Total ABL commitments by US lenders were about \$465 billion in 2018 and are expected to grow in the range of 6%–7% in 2019, as new ABL commitments continue to outpace run-off. About \$164 billion of ABL commitments were originated in 2018, a slight increase over 2017.

Syndicated to non-syndicated

LPC Refinitiv maintains track of syndicated ABL loans outstanding in the market. As of the end of Q3 2018, there were \$278.1 billion of syndicated ABL loan commitments in the market. Based on this value and further analysis, The [2019 Secured Finance Market Sizing & Impact Study](#) sized the syndicated market at \$283.7 billion as of the end of 2018.

We use this value to net from the aggregate amount of \$465 billion to arrive at an estimated \$182 billion of non-syndicated ABL in the market – or about 39% of the total market. We have assumed that this ratio of syndicated to non-syndicated holds steady for all periods shown

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