

Sukuk Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Sukuk Type (Murabahah Sukuk, Salam Sukuk, Istisna Sukuk, Ijarah Sukuk, Musharakah Sukuk, Mudarabah Sukuk, Others), By Currency (Turkish Lira, Indonesian Rupiah, Saudi Riyal, Kuwaiti Dinar, Others), By Currency Type (Sovereign, Corporate, Financial Institutions, Quasi-Sovereign, Others), By Region, By Competition 2019-2029

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Abstracts

Global Sukuk Market was valued at USD 1021.6 billion in 2023 and is anticipated to grow with a CAGR of 12.6% through 2029.

The global sukuk market, a pivotal component of Islamic finance, has witnessed substantial expansion in recent years. Sukuk, commonly referred to as Islamic bonds, comply with Sharia principles, prohibiting interest and ensuring investments adhere to ethical and Islamic guidelines. This market's growth has been fueled by a surge in demand for Islamic financial instruments, reflecting a broader global trend toward ethical and socially responsible investment practices.

Sukuk issuance has diversified across sectors, with governments, corporations, and financial institutions embracing this Islamic financing tool. This diversification has not only broadened the investor base but also increased the market's resilience. Sovereign sukuk issuances have been particularly notable, as countries seek alternative means to raise capital while adhering to Islamic financial principles.

Investors in the global sukuk market span a wide spectrum, including Islamic banks, institutional investors, and sovereign wealth funds, reflecting the market's growing appeal. Additionally, non-Muslim-majority countries have shown increasing interest in sukuk as a means to tap into Islamic liquidity and diversify their funding sources.

The development of sukuk markets across various regions, including the Middle East, Southeast Asia, and even non-traditional Islamic finance markets, underscores the global nature of this financial instrument. This growth has contributed significantly to the global prominence of Islamic finance, offering an alternative and ethical investment avenue for a diverse range of market participants. As the global economy continues to evolve, the sukuk market is poised to play an increasingly pivotal role in shaping the landscape of international finance.

Key Market Drivers

Islamic Finance's Rising Popularity

One of the fundamental drivers of the global sukuk market's growth is the increasing popularity and acceptance of Islamic finance principles worldwide. Islamic finance operates in accordance with Sharia law, which prohibits the payment or receipt of interest (usury) and encourages ethical and socially responsible investment. As awareness of these principles spreads, investors seeking ethical and Sharia-compliant financial products are drawn to sukuk as an alternative to conventional bonds.

The appeal of Islamic finance extends beyond Muslim-majority countries, with interest growing in regions where the Muslim population is a minority. As ethical investing gains traction globally, sukuk becomes an attractive option for a diverse range of investors looking to align their portfolios with Islamic financial principles.

Diversification of Issuers

Initially dominated by sovereign issuers, the sukuk market has witnessed a notable diversification in terms of the entities tapping into this financing tool. While governments, particularly in Muslim-majority nations, remain significant issuers, corporations and financial institutions have increasingly turned to sukuk to raise capital. This broadening base of issuers contributes to the market's depth and resilience.

Corporations across various sectors, including finance, real estate, and infrastructure,

have recognized the potential of sukuk to meet their financing needs. This diversification not only expands the range of investment opportunities for sukuk investors but also strengthens the market's overall stability by reducing dependence on a specific category of issuers.

Global Investor Interest

The global sukuk market has attracted a diverse array of investors, ranging from Islamic banks and institutional investors to sovereign wealth funds and conventional financial institutions. This increased investor interest is driven by the recognition of sukuk as a viable and attractive asset class with stable returns. Sukuk's appeal goes beyond its compliance with Islamic principles, as it offers investors an opportunity to diversify their portfolios and access new markets.

Non-Muslim-majority countries, including those in Europe and Asia, have shown a growing interest in sukuk as part of their efforts to tap into Islamic liquidity and diversify their funding sources. This cross-border interest contributes to the globalization of the sukuk market, expanding its reach and influence on the international financial stage.

Infrastructure and Economic Development Needs

The demand for infrastructure financing, particularly in emerging markets with a strong Islamic finance presence, has been a significant driver of sukuk issuance. Governments in these regions recognize sukuk as an effective tool to fund critical infrastructure projects, aligning with the principles of Islamic finance. Sukuk issuance has been used to finance projects such as roads, bridges, airports, and utilities, addressing the infrastructure gaps that hinder economic development.

The emphasis on sustainable and responsible financing aligns with the principles of Islamic finance, making sukuk an attractive option for entities seeking funding for projects with positive social and environmental impacts. As global attention turns toward sustainable development goals, sukuk's role in financing projects that contribute to economic growth and social well-being is likely to increase.

Regulatory Support and Standardization

Regulatory frameworks play a crucial role in shaping the development of financial markets, including the sukuk market. Many countries with a significant Islamic finance presence have established or enhanced their regulatory frameworks to support sukuk

issuance. Regulatory clarity and supportive environments encourage both issuers and investors to participate in the market.

Additionally, efforts to standardize sukuk structures and documentation have facilitated market growth. Standardization enhances transparency, reduces complexity, and provides a more consistent framework for investors. Organizations such as the International Islamic Financial Market (IIFM) and the Accounting and Auditing Organization for Islamic Financial Institutions (AAOIFI) have played key roles in developing standardized practices, contributing to the market's maturity and attractiveness.

Key Market Challenges

Lack of Standardization

One of the primary challenges facing the sukuk market is the absence of standardized practices across issuances. Unlike conventional bonds that often follow widely accepted structures and documentation, sukuk structures can vary significantly from one issuance to another. This lack of standardization introduces complexity and increases the due diligence required for both issuers and investors.

Efforts to establish standardized practices have been made by organizations like the International Islamic Financial Market (IIFM) and the Accounting and Auditing Organization for Islamic Financial Institutions (AAOIFI). However, achieving widespread agreement on standardized sukuk structures remains a complex task. The absence of a consistent framework can lead to uncertainties and may deter potential investors who prefer clarity and predictability in their investment instruments.

Limited Secondary Market Liquidity

The sukuk market faces challenges related to liquidity in the secondary market. Unlike conventional bonds, which often have active and liquid secondary markets, sukuk can be less liquid, making it challenging for investors to buy or sell their holdings. This illiquidity is partly attributed to the unique nature of sukuk contracts, which can be more intricate and less familiar to a broad range of investors.

The lack of liquidity in the secondary market hampers the market's overall efficiency and attractiveness. Investors may be hesitant to enter the market if they perceive difficulties in exiting their positions. Improving liquidity requires addressing structural issues,

encouraging market-making activities, and fostering a more active secondary market where investors can trade sukuk with greater ease.

Taxation and Regulatory Challenges

Taxation and regulatory frameworks can pose challenges for the sukuk market. In some jurisdictions, the tax treatment of sukuk may differ from that of conventional bonds, creating a potential disadvantage for sukuk investors. Regulatory uncertainties and inconsistencies across borders can impede the growth of the sukuk market by creating obstacles for issuers and investors alike.

Moreover, regulatory frameworks in certain jurisdictions may not be fully aligned with the principles of Islamic finance, making it difficult for issuers to structure sukuk in a Sharia-compliant manner. Harmonizing regulatory approaches, addressing tax-related disparities, and providing clear guidelines for sukuk issuance can enhance the market's attractiveness and encourage greater participation.

Educational and Awareness Gaps

Despite the growing popularity of Islamic finance, there remain significant educational and awareness gaps, both among investors and the general public. Many potential investors may not fully understand the intricacies of sukuk structures, the principles of Islamic finance, or the potential benefits of including sukuk in their investment portfolios.

Addressing these gaps requires comprehensive educational initiatives to raise awareness about sukuk, its principles, and its potential advantages. Financial institutions, regulatory bodies, and educational institutions play crucial roles in disseminating knowledge and fostering a better understanding of sukuk among market participants. Improved awareness can lead to increased demand for sukuk and contribute to the market's long-term sustainability.

Key Market Trends

Green and Sustainable Sukuk

As global awareness of environmental, social, and governance (ESG) considerations grows, there is an increasing emphasis on green and sustainable finance. The sukuk market is no exception, witnessing a rising trend in the issuance of green and sustainable sukuk. These instruments are designed to fund environmentally friendly and

socially responsible projects, aligning with the principles of Islamic finance.

Green sukuk typically finance projects such as renewable energy, energy efficiency, and sustainable infrastructure. This trend reflects a broader shift towards responsible investing and supports the integration of Islamic finance with sustainability goals. Governments and corporations are recognizing the potential of green and sustainable sukuk to attract a wider investor base and contribute to sustainable development.

Digitization and Technology Integration

The financial industry, including Islamic finance and sukuk markets, is undergoing a digital transformation. The integration of technology is evident in various aspects of sukuk issuance, trading, and settlement processes. Digital platforms and blockchain technology are being explored to enhance transparency, reduce operational costs, and streamline the issuance and trading of sukuk.

Digitalization facilitates broader market access and enables more efficient communication between issuers and investors. Blockchain technology, with its inherent security and transparency features, can address concerns related to authenticity and traceability of sukuk assets. Embracing technology is not only a response to market demands for efficiency but also a way to attract a younger generation of tech-savvy investors to the sukuk market.

Diversity in Sukuk Structures

The global sukuk market has witnessed a trend towards greater diversity in sukuk structures. While traditional sukuk structures, such as Mudarabah and Ijarah, continue to be prevalent, there is a growing exploration of innovative structures to meet the evolving needs of issuers and investors. This trend includes the issuance of hybrid sukuk and the incorporation of new asset classes.

Innovation in sukuk structures allows issuers to tailor financial instruments to specific projects or industries, enhancing flexibility and attractiveness. Investors benefit from a wider range of investment options and risk profiles. The embrace of diverse sukuk structures reflects the market's adaptability and willingness to evolve in response to changing financial landscapes.

Cross-Border Sukuk Issuance

Sukuk markets are increasingly becoming global, with a rising trend in cross-border sukuk issuance. Governments, corporations, and financial institutions are tapping into international markets to diversify funding sources and attract a broader investor base. This trend is supported by the globalization of Islamic finance and the growing interest in sukuk from non-Muslim-majority countries.

Cross-border sukuk issuance contributes to the integration of Islamic finance into the global financial system. It also helps in developing a yield curve for sukuk, making it easier for issuers and investors to benchmark pricing and performance. The trend towards cross-border issuance signifies the growing recognition of sukuk as a mainstream financial instrument on the global stage.

Islamic Fintech and Sukuk

The intersection of Islamic finance and financial technology, commonly known as Islamic fintech, is influencing the sukuk market. Fintech innovations are being leveraged to enhance the efficiency of sukuk issuance, trading, and distribution. Platforms offering digital investment solutions compliant with Islamic principles are gaining traction, providing investors with accessible avenues to participate in the sukuk market.

Islamic fintech also contributes to financial inclusion by making sukuk investment opportunities available to a broader range of investors. Moreover, fintech solutions can address challenges such as the lack of liquidity in the secondary sukuk market, providing more streamlined and accessible trading platforms.

Regulatory Support and Harmonization

Regulatory frameworks play a pivotal role in shaping the sukuk market, and there is a noticeable trend towards increased regulatory support and harmonization. Many jurisdictions are actively enhancing their regulatory environments to accommodate and promote sukuk issuance. Regulatory clarity provides issuers and investors with a stable and supportive framework, fostering confidence in the market.

International organizations and standard-setting bodies, such as the Islamic Financial Services Board (IFSB) and the AAOIFI, contribute to the development of standardized practices and guidelines. Efforts towards harmonization aim to create a more consistent regulatory landscape, facilitating cross-border sukuk issuance and fostering a conducive environment for market growth.

Segmental Insights

Sukuk Type Insights

Murabahah sukuk has emerged as a growing and significant segment within the global sukuk market. This financial instrument represents a form of Islamic financing structured on the concept of Murabahah, a cost-plus-profit arrangement. Murabahah sukuk are essentially certificates of ownership backed by specific tangible assets acquired through a Murabahah transaction.

Investors are attracted to Murabahah sukuk due to their clear and transparent structures, which involve the sale of goods at a disclosed cost plus an agreed-upon profit margin. This simplicity and transparency make Murabahah sukuk accessible to a broader range of investors, contributing to the segment's growth.

Corporations and governments increasingly utilize Murabahah sukuk to raise capital for various purposes, including project financing and working capital needs. The flexibility of the Murabahah structure allows issuers to tailor sukuk issuances to specific funding requirements, making it a versatile choice.

As the demand for Islamic financial instruments continues to rise globally, Murabahah sukuk's prominence is likely to expand further. This growth is driven not only by the instrument's adherence to Sharia principles but also by its adaptability and appeal to a diverse investor base seeking ethical and transparent investment opportunities in the Islamic finance landscape.

Issuer Type Insights

Financial institutions have emerged as a dynamic and growing segment within the global sukuk market, playing a pivotal role in the expansion of Islamic finance. Islamic financial institutions, including Islamic banks and takaful companies, are increasingly utilizing sukuk as a strategic tool for capital raising and liquidity management. This trend is fueled by the growing demand for Sharia-compliant instruments and the industry's commitment to diversifying funding sources.

Sukuk issuance by financial institutions serves multiple purposes. It enables these institutions to bolster their capital base, supporting their expansion plans and ensuring compliance with regulatory requirements. Additionally, sukuk offerings provide an avenue for financial institutions to manage their liquidity effectively, aligning with the

principles of Islamic finance.

Investors, including institutional and retail participants, are drawn to sukuk issued by financial institutions due to the sector's stability and adherence to Sharia principles. These sukuk offerings often carry the credit strength of the issuing institution, providing investors with a reliable and ethical investment option.

As Islamic finance gains traction globally, financial institutions continue to explore innovative sukuk structures to meet their specific financing needs. The participation of financial institutions in the sukuk market contributes significantly to its depth, liquidity, and overall resilience, positioning them as a dynamic and integral segment in the evolving landscape of Islamic finance.

Regional Insights

The Middle East and Africa (MEA) have emerged as a thriving and pivotal segment within the global sukuk market, contributing significantly to the expansion of Islamic finance. With a substantial presence of Muslim-majority countries and a growing interest in Sharia-compliant financial instruments, the MEA region has become a key driver of sukuk issuance.

Governments in the Middle East, particularly those in the Gulf Cooperation Council (GCC) countries, have been actively utilizing sukuk as a strategic tool for financing infrastructure projects, diversifying funding sources, and promoting economic development. This has led to a surge in sovereign sukuk issuances, making the region a major player in the global sukuk landscape.

In addition to sovereign issuers, corporations and financial institutions in the Middle East and Africa are increasingly tapping into the sukuk market to meet their financing needs. The region's vibrant sukuk activity reflects the Islamic finance principles deeply rooted in the local economies.

Investor appetite in the MEA region for sukuk remains robust, with both domestic and international investors seeking exposure to Sharia-compliant assets. The growth of the sukuk market in the Middle East and Africa not only enhances financial market diversity but also strengthens the global prominence of Islamic finance, positioning the region as a key player in shaping the future of sukuk on the international stage.

Key Market Players

Abu Dhabi Islamic Bank PJSC

Al Baraka Banking Group

Al-Rajhi Bank

Banque Saudi Fransi

Dubai Islamic Bank

HSBC Holdings Plc

Kuwait Finance House

Malayan Banking Berhad

Qatar International Islamic Bank

RHB Bank Berhad

Report Scope:

In this report, the Global Sukuk market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Sukuk Market, By Sukuk Type:

Murabahah Sukuk

Salam Sukuk

Istisna Sukuk

Ijarah Sukuk

Musharakah Sukuk

Mudarabah Sukuk

Others

Sukuk Market, By Currency:

Turkish Lira

Indonesian Rupiah

Saudi Riyal

Kuwaiti Dinar

Others

Sukuk Market, By Currency Type:

Sovereign

Corporate

Financial Institutions

Quasi-Sovereign,

Others

Sukuk Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global Sukuk market.

Available Customizations:

Global Sukuk Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Global Sukuk Market is an upcoming report to be released soon. If you wish an early delivery of this report or want to confirm the date of release, please contact us at sales@techsciresearch.com

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