

Indonesia Insurance Report Q2 2016

<https://marketpublishers.com/r/11B3E54A56BEN.html>

Date: March 2016

Pages: 59

Price: US\$ 1,295.00 (Single User License)

ID: 11B3E54A56BEN

Abstracts

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BMI View: The positive structural trends of Indonesia's insurance sector remain in place. Although the slowing of the economy and the political environment (in particular the lack of progress with reform) appears to have had an adverse impact on life insurance premiums written, many of the companies are achieving good and profitable growth by other metrics. Interestingly, the economic slowdown appears to have had little impact on the motor vehicle insurance and property insurance sub-sectors of the non-life segment.

Key Updates and Forecasts

The economic slowdown, and the lack of progress by the government with reforms, has weighed on consumer sentiment. Volatile markets have reduced the appeal of a number of the life insurers' mutual funds and other wealth management offerings. Data from the regulator and from the companies suggest that the risks to our estimates/projections for life insurance premiums in 2015-17 are to the downside. Nevertheless, several of the leading insurers have achieved strong and profitable growth by other metrics.

The latest data from the regulator suggests that the economic slowdown - perhaps surprisingly - has had little adverse impact on the non-life segment and, in particular, the important motor vehicle and property sub-sectors. The implication is that the non-life insurers are benefiting from further growth in the number of vehicles on Indonesia's roads and increasing numbers and values of insurable risks. It also appears that, in spite of the fragmentation of the marketplace, the lack of scale of many of the players and downwards pressure on prices globally, pricing has remained disciplined.

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