

# Asia-Pacific Insurance Market Outlook to 2016 - Growth Opportunity in India and China

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## Abstracts

The report titled “Asia-Pacific Insurance Market Outlook to 2016 - Growth Opportunity in India and China” provides a comprehensive analysis of market size of the insurance industry on the basis of countries such as Japan, China, South Korea, Taiwan, India and Australia, market segmentation of life and non life insurance industry. The report also entails the value chain of Asia-Pacific insurance market. The report also provides competitive landscape and profile of major players operating in the insurance industry.

The future projections included to provide an overview of the prospects and expected growth drivers in the Asia-Pacific insurance industry.

### Asia-Pacific

The insurance industry is one of the potential industries in the emerging markets of Asia-Pacific region such as China, India, Thailand, Taiwan, Malaysia and others. The rising personal disposable income due to improving economic conditions which has encouraged the insurance players to divert their attention in the growing market of Asia-Pacific region. In addition, China and India have ongoing infrastructure projects with massive amount of investment which will contribute to new business development in the line of property and commercial insurance.

Over the coming years, the direct written premium of insurance in Asia-Pacific region is projected to rise at a CAGR of 11.2% in the next four years due to rising population in the market of India and China

### Japan

Japan insurance industry is the second largest market in the world after the US. The country's insurance market has increased at a CAGR of 10.4% from FY'2005-FY'2012 with the direct written premium of USD ~ million in FY'2012 in comparison to USD 312,983.5 million in FY'2005. The growth has been influenced by an incline in the number of insured person, strong growth in the sales of saving type products in major life insurance companies, rise in asset formulation and the limitation of domestic investment opportunities which has led the Japanese insurance players to look outward for investments. The insurance companies in Japan have experienced an increase of ~% in assets to JPY ~ million in FY'2012 in comparison to JPY ~ million in FY'2011 due to surge in unrealized capital gains which has inclined the value of investment assets

## China

The Chinese insurance industry has seen rapid expansion during 2005-2012 and will continue to see high growth rates in the next few years. The insurance market in the country has witnessed a compound annual growth rate of 22.2% in the last seven years and has recorded direct written premium of USD ~ million in 2012. The growth in the insurance industry is influenced by the fast growing economy coupled with the largest population in the world, surging personal disposable income and continuous economic system reforms in the country.

## South Korea

The South Korean insurance market is one of the largest insurance industries in the world. The insurance market in the country has experienced a growth of ~% from USD ~ million in FY'2010 to USD ~ million in FY'2011. The growth in the market is due to the regulatory development, government support, economic growth and rising income level to become the 8th largest insurance market globally in terms of direct written premium.

## Taiwan

Taiwan is the second largest market in the Asia-Pacific region after Japan in terms of highest insurance densities. The country insurance industry has a high penetration rate of ~% but there is a huge difference between the penetration rate of life insurance and non life insurance. The penetration rate of life insurance market is ~% in comparison to ~% of the general insurance industry in 2011. The key reasons behind the difference in the penetration rate is the decreasing investment by the domestic consumers in

automobiles and the occurrence of natural disaster have restricted the growth of the non life insurance business. The country insurance market is growing stably and has registered direct written premium of USD ~ million in 2011.

## India

The insurance sector in India has been open up for the foreign direct investment some 12 years ago. In India, the foreign direct investment is restricted to 26% and is expected to increase to 49% in 2013. In September 2012, there are ~ insurance companies operating in India of which 24 are in life insurance business and ~are non life insurance players while GIC is the sole national reinsurer. In the present scenario, ~ out of ~ life insurance companies and ~ out of ~ general insurance players have foreign partners. The contribution of foreign players is expected to increase in the coming years with an incline in the foreign direct investment.

## Australia

The insurance market of Australia has experienced decline in the growth rate from ~% in FY'2011 to ~% in FY'2012 on account of the decrease in the direct written premium of the life insurance industry on account of reduction in the sales of investment linked products. The industry has also experienced the decline in the solvency margin ratio from ~% in 2009 to ~% in 2012 primarily due to an increased frequency of natural catastrophe. The solvency margin ratio is an important indicator which is used to judge whether an insurance company has enough cash surplus in order to pay claims to policyholders as scheduled.

## KEY TOPICS COVERED IN THE REPORT

The market size of the Asia-Pacific insurance Industry and its segments such as life and non-life, 2005-2012P

The market size of the insurance market in the six countries such as Japan, China, South Korea, Taiwan, India and Australia, 2005-2012P

Market segmentation of life and non-life insurance markets in the six countries such as Japan, China, South Korea, Taiwan, India and Australia, 2005-2012P

Value chain of Asia-Pacific insurance market

Trends and Development of the Asia-Pacific insurance industry.

Competitive landscape of the major players of life and non-life insurance markets in the six countries such as Japan, China, South Korea, Taiwan, India and Australia

Future outlook and projections of the Asia-Pacific and six countries

Future outlook and projections of life and non-life insurance in six countries

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