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Israel Insurance Industry Outlook to 2017 - Life Insurance to Lead the Market

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Abstracts

The report titled ‘Israel Insurance Industry Outlook to 2017 – Life Insurance to Lead the Market’ provides a comprehensive analysis of the various aspects such as market size, segmentation, market share of major players and future projections of life, non-life, motor vehicle property, motor vehicle compulsory, health and hospitalization, property and comprehensive business, comprehensive flats, personal accidents, employers liability, engineering, mortgage banks, marine freight, aircraft and vessel and other liabilities. The report provides the company profiles of major players present in the Israeli life and non-life insurance market.

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About

The report titled 'Israel Insurance Insurance Outlook to 2017 – Life Insurance to Lead the Market' provides a comprehensive analysis of the various aspects such as market size, segmentation, market share of major players and future projections of life, non-life, motor vehicle property, motor vehicle compulsory, health and hospitalization, property and comprehensive business, comprehensive flats, personal accidents, employers liability, engineering, mortgage banks, marine freight, aircraft and vessel and other liabilities. The report provides the company profiles of major players present in the Israeli life and non-life insurance market.

The insurance market in the country is concentrated with five large insurance companies accounting for 90% of the insurance premiums in the country. However, most of the insurers are composite companies and transact in both life and non-life business. CMISD is responsible for the supervision of 23 insurance companies, 11 new pension funds, 18 old pension funds, 65 management fund companies which together had assets of almost NIS 1.0 trillion as of June 30, 2011. The life insurance market of the country is dominated by high demand for unit linked products where the policyholder bears the risk involved in investment. As a result the life insurance industry of the country generally has stable income based on asset management fees. The other life insurance products such as term and endowment hold only a minor share of the market. Non-life insurance accounts for around 45.4% of the total insurance premiums generated in the country in which motor vehicle insurance alone makes up about 48.5% of the premiums. With total insurance premium of USD ~ million in 2012 the Israeli insurance market is significant in absolute terms as well as percentage of GDP.

Life insurance is the largest segment in the insurance market of Israel indicating high preference of the population of the country for life insurance products. The share of the segment in the insurance market of the country has consistently increased from 49.2% in 2007 to 52.2% in 2010 and 54.6% in 2012. In the year 2012, the life premiums underwritten by these companies increased to USD ~ million indicating a CAGR of 8.5% during 2007-2012.

The non-life insurance market of Israel can be categorized into thirteen broad segments comprising motor vehicle propriety insurance, motor vehicle compulsory insurance, health and hospitalization insurance, loss of property and comprehensive business, comprehensive flats, personal accidents, employers' liability, other liability branches, engineering, mortgage banks, aircraft and vessel, marine freight and other risks. Motor

vehicle propriety insurance is the largest segment and contributes ~% to the non-life insurance market. This is followed by motor vehicle compulsory insurance which has a share of 21.1% in the non-life gross premiums underwritten in the country. Health and hospitalization is the third largest segment and accounts for 16.7% of the non-life premiums underwritten in the country.

Motor vehicle property insurance is the largest segment in the non-life insurance market of Israel and contributes 27.4% to the gross premiums generated. The market for this insurance segment has grown at a CAGR of 2.1% during 2007-2012 where the gross premiums underwritten by various motor insurers have reached USD ~ million in 2012 from USD ~ million in 2007.

The health and hospitalization premiums in Israel have increased from USD ~ million in 2007 to USD ~ million in 2012, where the share of the segment in the non-life insurance market of the country has grown from 13.7% in 2007 to 16.7% in 2012. The health and hospitalization insurance market of Israel consists of Harel, Phoenix, Clal, Migdal and Menora as major players. Harel is the largest player with a market share of ~% of the total premiums generated in this segment as of 2012. This is followed by Phoenix which accounted for ~% of the gross premiums in 2012. Clal holds the third position which had a share of ~% in the total health and hospitalization premiums underwritten in the country in the same year.

The insurance market of Israel is projected to grow strongly in the coming years on account of the high positive growth of the life and non-life insurance segments. However, the insurance market of the country is estimated to continue to be dominated by the life insurance segment which is expected to achieve higher growth over the non-life insurance segment. The insurance market of the country in a base case scenario is projected to grow at a CAGR of 9.6% during 2012-2017 to reach USD ~ million in 2017. In this case, the insurance premiums will surge year-on-year until 2017 on account of the rising population, political and financial stability and steady GDP growth of the country. Because of the rising population, the demand for various life and non-life insurance products would continue to incline in coming years.

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